



CAREWare User Manual

**Florida Department of Health
HIV/AIDS Section
Patient Care Program**

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CAREWare User Manual

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INTRODUCTION

What is CAREWare?










CAREWare is free, scalable software for managing and monitoring HIV clinical and supportive care. The HIV/AIDS Section, Florida Department of Health (Department), uses CAREWare to track services funded by Ryan White Part B, Patient Care Network, Housing Opportunities for Persons with AIDS (HOPWA) and General Revenue. A number of agencies that are funded by other sources have joined the Section's CAREWare network. This arrangement contributes greatly to the Section's ability to track service usage and monitor the quality of care across multiple providers. In fact, the Department of Health's CAREWare network is the largest in the world, with over 100 participating agencies.

The purpose of this manual is to demonstrate proper methods of data entry into CAREWare. This manual is not all encompassing of every field and functionality available in the application. There are a number of features/fields that most users will not use that are not detailed. If you have any questions about using CAREWare, please call the Help Desk at 1-850-922-7599. Explain your issue in detail and ask that the ticket be assigned to the CAREWare team.

When submitting a ticket to the Help Desk, do not include any client identifying information in the ticket. If you must make a change to a client's record, inform the Help Desk operator that you need client data changed. CAREWare staff will get the specific client information when they return your call. For a listing of information that is confidential, see Appendix A—Confidential CAREWare Client Identifiers.

Legend

To help you more easily navigate CAREWare, this manual was written with a color-coded system for the various data entry functions used in the database.

-  Indigo – screens
-  Teal – buttons
-  Orange – tabs
-  Light blue – fields, most of which contain free text
-  Plum – multiple-choice options, such as drop-down menus
-  Green – radio buttons and check boxes
-  Dark red – hyperlinks
-  Lime – selections available under multiple-choice options
-  Pink – forms

Chapter I – Access

Background – In order to work in the State of Florida CAREWare Network, staff must understand, accept and perform the standards of data entry and data protection described in this manual. The highest priority when working with our CAREWare network is to safeguard client information. Only after understanding and accepting that responsibility will individuals be granted log in credentials to the database.

Part 1 – Confidentiality of CAREWare Data

Protocol for Breaches of Confidentiality of CAREWare Data

Purpose

This protocol outlines the steps that will be taken when there is a breach of protected health information entered into CAREWare. The protocol is intended to supplement DOHP 50-10-10 Information and Security Policy or local policies written to conform to the security requirements of Department of Health HIV/AIDS patient care contracts and subcontracts. More restrictive state or federal rules, regulations or laws take precedence over this protocol.

Definitions

1. *Breach of confidentiality of CAREWare data*—Occurs when individual identifiers, as described in “Confidential CAREWare Client Identifiers” (Appendix A), are accessed by or shared with person(s) who are not legally authorized to know a client’s HIV status or other protected health information.
2. *Electronic breach of confidentiality of CAREWare data*—Occurs when individual identifiers, as described in “Confidential CAREWare Client Identifiers” (Appendix A), are electronically transmitted unencrypted, or accessed or shared with person(s) who are not legally authorized to know a client’s HIV status or other protected health information.

Procedure

1. For a first offense of breach of confidentiality of CAREWare data:
 - a. The HIV/AIDS Section (HAS) will notify the user of the breach and the user will be locked out of CAREWare until the steps in paragraphs 1.b-d are completed.
 - b. HAS will notify the user’s supervisor and/or the executive administrator of the user’s organization of the seriousness of this issue and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.
 - c. HAS staff will report the breach to HAS’s Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the Division of Disease Control and Health Protection’s (Division) security officer or the Department’s Inspector General for review.

- d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-delete the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.
2. For a second offense of breach of confidentiality of CAREWare data:
- a. HAS will notify the CAREWare user of the breach and the user will be locked out of CAREWare.
 - b. HAS will notify the user's supervisor and/or the executive administrator of the user's organization of the seriousness of this issue and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.
 - c. HAS staff will report the breach to the HAS' Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the Division security officer or the Department's Inspector General for review.
 - d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-delete the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.
 - e. If the supervisor/executive director wants the user to have access to the system after the second breach, the supervisor/executive director will send in a written request (email is acceptable) to HAS asking that the user be granted access to CAREWare.
 - f. An internal HAS panel comprising representatives of the Division's information security officers, the HIV/AIDS Surveillance Unit and the HIV/AIDS Patient Care Community Programs Unit will review the incident. The panel will meet as soon as possible and decide the appropriate remedy for the violation.
 - g. If the user or their organization disagrees with the decision of the panel, they may appeal the decision to the HAS administrator.
3. For a third or subsequent offense of breach of confidentiality of CAREWare data:
- a. HAS will notify the CAREWare user of the breach and the user will be **permanently** locked out of CAREWare.
 - b. HAS will notify the user's supervisor and/or the executive administrator of the user's organization and require an acknowledgement by their supervisor/administrator in writing. An email to the HAS staff making the notification is acceptable written acknowledgement.
 - c. HAS staff will report the breach to the HAS' Information Security and Privacy Coordinator, who will submit an Incident Report. Depending on the severity of the breach, the Incident Report will be sent to the Division security officer or the Department's Inspector General for review.

- d. If an electronic breach of confidentiality of CAREWare data is by unencrypted transmission via email, the sender and all recipients will be instructed to double- or triple-delete the email, depending on the sender's and recipients' email program(s). The HAS staff member who reports the breach is responsible for notifying Department staff to delete the email. The user is responsible for notifying all other recipients.
- e. The user or their organization may appeal the permanent lock-out to the HAS administrator.

Part 2 – Access to CAREWare

Adding a New User to CAREWare

For employees required to use the CAREWare database, call the **Help Desk at 850-922-7599** to request the creation of a new CAREWare account.

If the employee requesting access is a Department employee:

1. A local CAREWare provider administrator contacts the Help Desk and requests the assignment of a new CAREWare user ID. The Help Desk creates a ticket and emails it to the requestor. This email includes the New User Packet comprising the CAREWare Account Request Form, Confidential CAREWare Client Identifiers (Appendix A) and the Protocol for Breaches of Confidentiality of CAREWare Data.
2. Complete the CAREWare Account Request Form; scan the completed document; attach it to the ticket; and email it back to the Help Desk.
3. The Reporting Unit creates a CAREWare user ID and notifies the individual when their account is established.
4. All necessary application files will be made available to the new user so they may have their local IT department install the software.

If the employee requesting access is not a Department employee:

1. A local CAREWare provider administrator contacts the Help Desk and requests the assignment of a new CAREWare user ID. The Help Desk creates a ticket and emails it to the requestor. This email includes the New User Packet comprising the CAREWare Account Request Form, Confidential CAREWare Client Identifiers (Appendix A) and the Protocol for Breaches of Confidentiality of CAREWare Data.
2. Complete the CAREWare Account Request Form; scan the completed document; attach it to the ticket; and email it back to the Help Desk.
3. After receipt of the document listed in Step 2, a network user name is created and a Citrix Request form is completed by the Reporting Unit and emailed to the user through the Help Desk ticket.
4. The requestor signs the Citrix Request form, scans it, attaches it to the ticket and emails the signed form to the Help Desk.
5. Once Citrix rights have been granted, the user will be notified that their account is established and the link to the Citrix Receiver will be emailed to them.
6. The user or their local IT staff will install the Citrix Receiver.

Removing Users from CAREWare

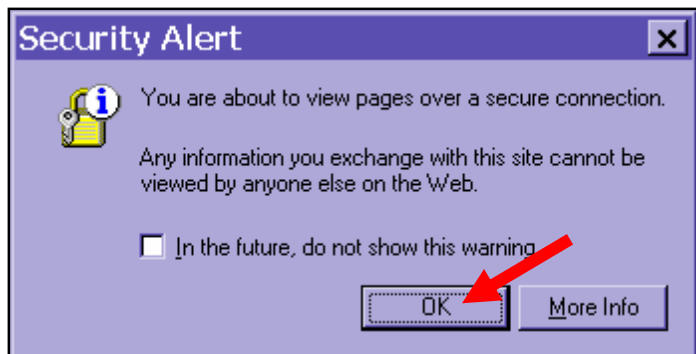
It is the responsibility of the local agencies to notify the Reporting Unit and their contract manager when an employee should no longer have access to CAREWare.

1. The local agency's CAREWare provider administrator must immediately lock out the user from the application.
2. Once the user is locked out, the provider administrator must call the Help Desk (850-922-7599) and request a CAREWare user ID close out.
3. The Help Desk creates a ticket and emails it to the requestor. This email includes the CAREWare Request form.
4. The requestor completes the CAREWare Account Request form, scans it, attaches it to the ticket and emails the signed form to the Help Desk.
5. The Reporting Unit revokes the user ID from the domain/domains.
6. The agency's local CAREWare Provider Administrator contacts contract manager to notify of deletion.

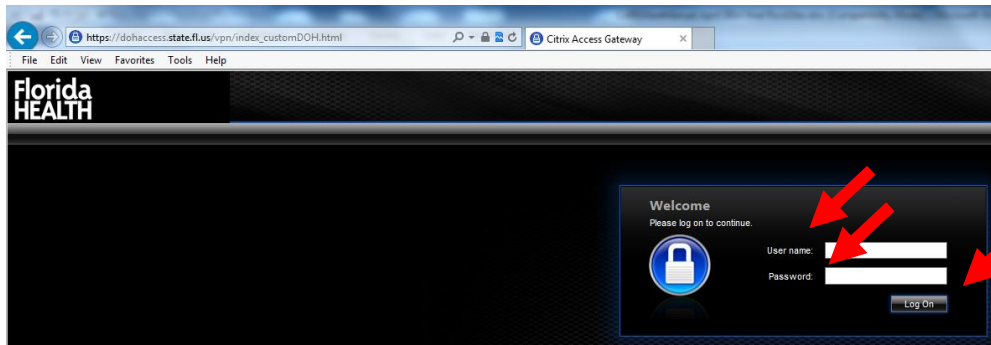
Part 3 – Citrix Log-on for Staff of Private Agencies

Users who work on a computer that is not directly connected to the Department network must access the system through Citrix. Download the Citrix Receiver from <http://receiver.citrix.com/> and run the CitrixReceiverWeb.exe file to install. Citrix uses pop-ups, so Internet Explorer pop-up blocker should be turned off. If you have any questions, please call the Help Desk at 850-922-7599.

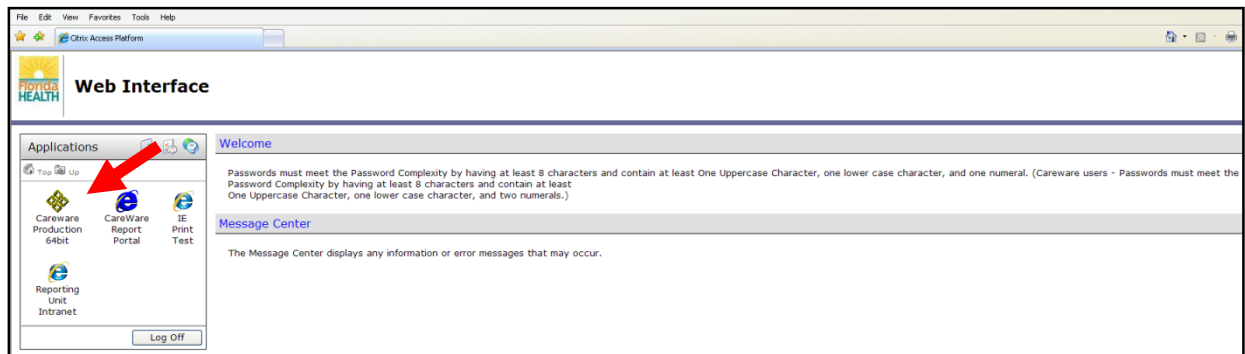
1. Citrix Log-on: Open your Internet browser and enter the following address:
dohaccess.state.fl.us
2. Click **OK** if the screen below appears. If the screen does not appear, move to the next step.



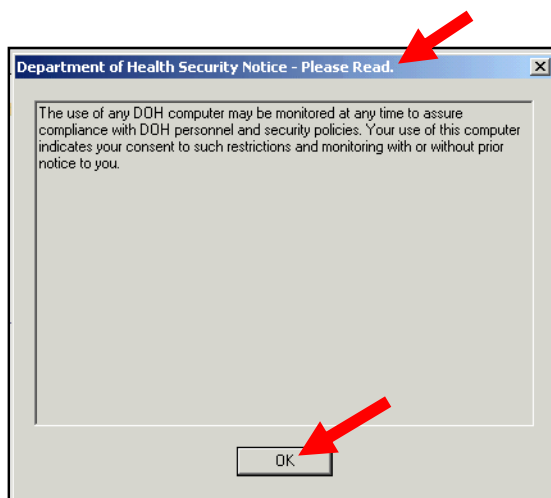
- The site will take you to **Citrix Access Platform** screen. Enter your Department account **User Name** and **Password** and click **Log On**.



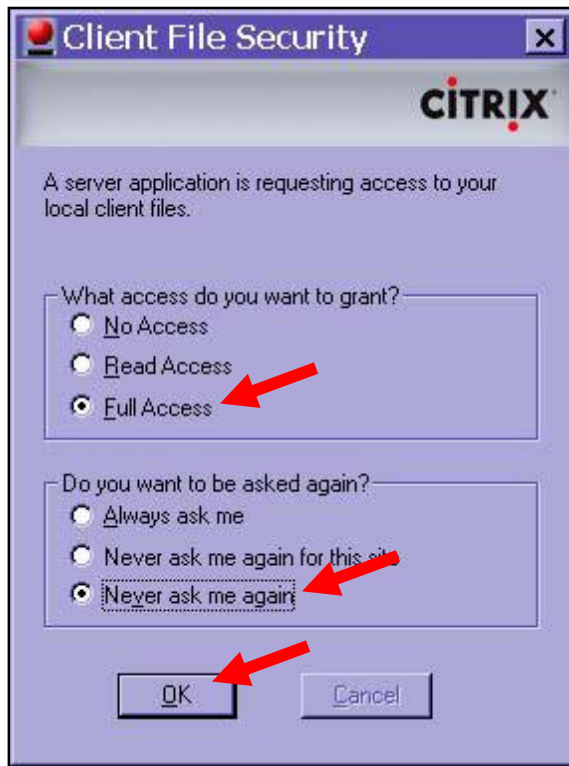
- Click on the **CAREWare Production** icon.



- The **Department of Health Security Notice – Please Read** screen will appear as the Citrix client connects to the Department's network. Click **OK**.



6. Select the **Full Access** and **Never ask me again** options if the **Client File Security** screen appears. If the screen does not appear, move to the next step. Click **OK**.



Part 4 – CAREWare Login

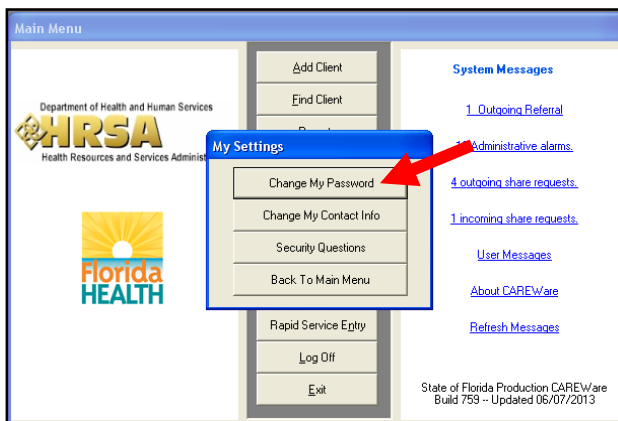
1. Go to the **RW CAREWare Login** screen. Enter your **User Name** and temporary **Password** (assigned by the system administrator). Click **Login**.



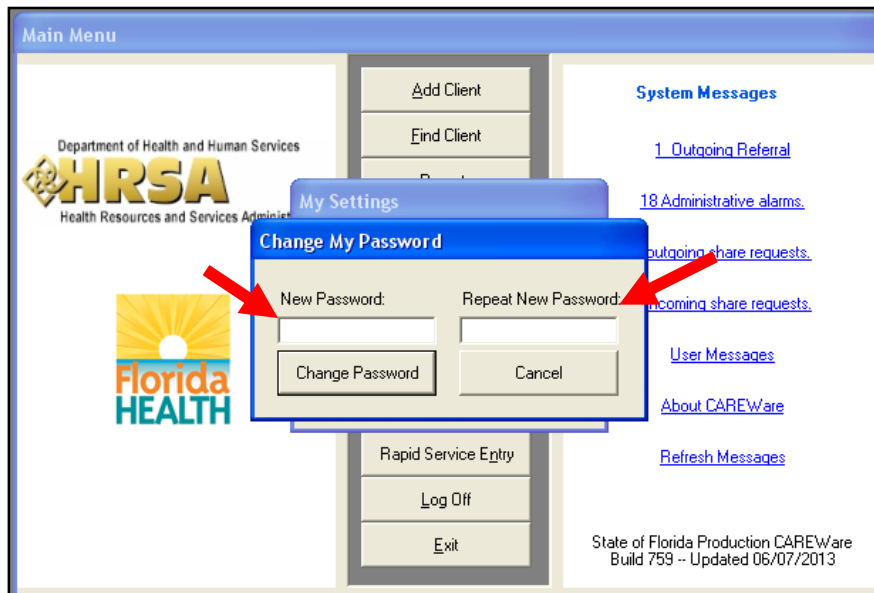
2. To change the temporary password provided, select **My Settings** from the **Main Menu**.



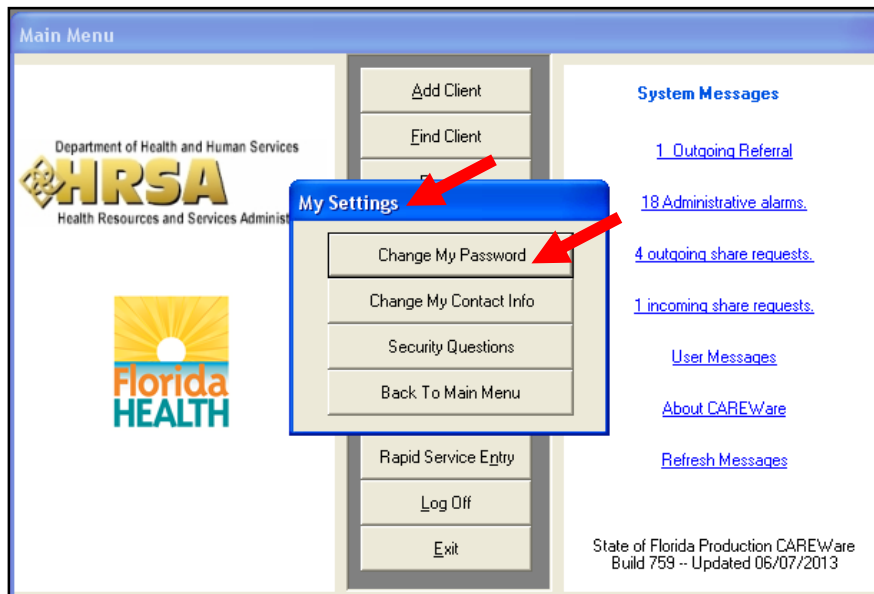
3. From the **My Settings** screen, select **Change My Password**.



4. The **Change My Password** screen will prompt you to enter a **New Password** and **Repeat New Password**. Click on the **Change Password** button when completed.



5. Select **Change My Contact Info** from the **My Settings** screen.



6. Enter your **First Name**, **Last Name**, **Phone** (including extension) and **Email** address in the **Contact Information** screen. Click **Save**.

The screenshot displays the 'Main Menu' interface of the 'State of Florida Production CAREWare' application. A 'Contact Information' dialog box is open, allowing users to enter their details. The dialog box includes the following fields and controls:

- Title Bar:** 'Contact Information' (highlighted with a red arrow)
- Fields:**
 - User Name / Login ID:** Contains the text 'S1'.
 - First Name:** An empty text field.
 - Last Name:** An empty text field.
 - Phone:** An empty text field.
 - Email:** An empty text field.
- Buttons:** 'Save' and 'Cancel' buttons at the bottom right of the dialog.

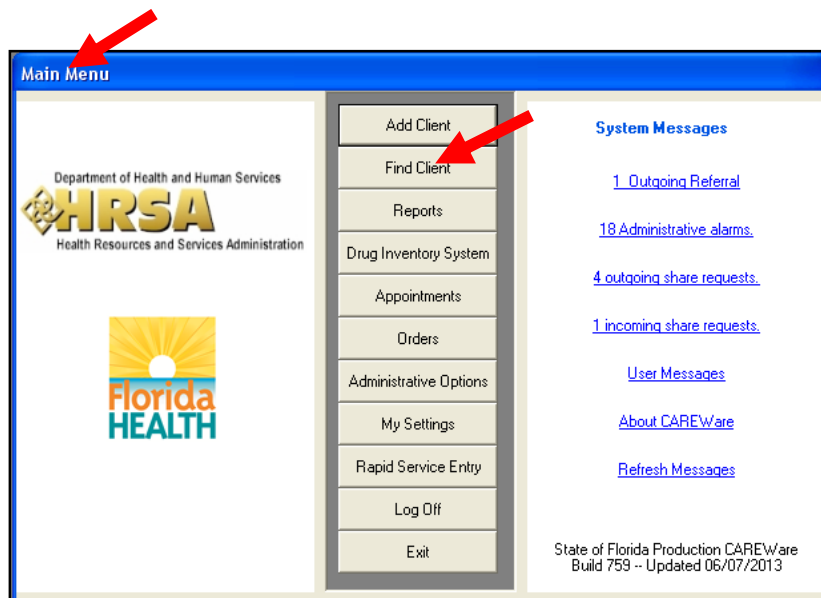
The background 'Main Menu' window features a blue header bar with the text 'Main Menu'. Below the header, there is a 'System Messages' section. A central panel contains buttons for 'Add Client' and 'End Client'. At the bottom of this panel are buttons for 'Log Off' and 'Exit'. The footer of the application window displays the text: 'State of Florida Production CAREWare Build 759 -- Updated 06/07/2013'.

Chapter II – Client Data

Background – Following standards of data entry is a very important step in order to have valid and reliable data. By inputting accurate data properly, we can greatly increase the quality of our reporting. The Health Resources and Services Administration (HRSA) requires client level data be submitted yearly for individuals receiving HRSA funding. The state of Florida also mandates a number of data points be submitted for clients. The data captured in CAREWare is used to meet these needs. Thus, it is critical that our users follow a standard method of inputting information into CAREWare. If any portion of this chapter is unclear, please submit a Help Desk ticket by calling 850-922-7599. Tell the operator “you have some questions on data entry.” Have the ticket assigned to the CAREWare Team. Make sure to **NOT PUT ANY** client information in the ticket as the database the Help Desk uses is not secure. A CAREWare Team member will call you back to answer any of your questions. A note about saving. Some fields in CAREWare do not require the clicking of a **Save** button, while other fields do. An indicator of whether or not inputted data requires the selection of a **Save** button is your inability to select any other option on the screen. Only by pressing the **Save** button are you able to move into other areas of CAREWare.

Part 5 – Finding a Client

1. To search for a client, select **Find Client** from the **Main Menu**.



- When the **Find Client** screen appears, enter search text into any of the fields: **Last Name**, **First Name**, **Client ID**, **Client URN** (Unique Record Number) or **Client UCI** (Unique Client Identifier, auto-generated by CAREWare), and select **Search**

Find Client

Enter search criteria. Partial matches will be included.

Last Name:

First Name: a

Client ID:

Client URN:

Client UCI:

☐ View Active Clients Only

Maximum Results: 1000

Search Cancel

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- The **Search Results** screen will provide a list of clients who match the criteria entered into the search screen. Be aware that the results will not begin with the search criteria entered, but will contain the same character string. For example, below a search of "a" was performed in the **First Name** field. The results contain names that have an "a" somewhere in the first name, not necessarily at the beginning

Search Results

Search results for criteria: First Name Like 'a', All Enrolled Clients.

Last Name	First Name	Client ID	Client URN	Client EURN	Client UCI
Bunnyrabbitt	Janet	111-22-3333	JNBN0101652U	Art84QpwD	58A4B6B86778104
Butter	Peanut		PABT0101802U	Mf7wXDbl	0FBD97E4204FBA6
Grape	Apple		APGA0101922U	MmZe4aDIP	B2B998D3FCFB617
Green	Branch		BAGE0101802U	f5gQRqyB	00173F1CC18BA19
Grey	Sara	111-22-3333	SRGE0101802U	QZt5aH6KN	3DDAC18A2EAD61
Peanutbutter	Dani	111-22-3333	DNPA0101802U	D4c+k1c0t	7A7797AEACF4EBF

Forms Details Modify Search New Search Close

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4. Select the record for which you are searching and double-click, or highlight and select **Details** to view the client's record.

Main Menu

Search Results
Search results for criteria: First Name Like 'a', All Enrolled Clients.

Last Name	First Name	Client ID	Client URN	Client EURN	Client UCI
Bunnyrabbit	Janet	111-22-3333	JNBN0101652U	Art84QpwD	58A4B6B86778104
Butter	Peanut		PABT0101802U	Mt7wXDbl	0FBD97E4204FBA6
Grape	Apple		APGA0101922U	MmZe4aDIP	B2B998D3FCFB617
Green	Branch		BAGE0101802U	f5igQRqy8	00173F1CC18BA19
Grey	Sara	111-22-3333	SRGE0101802U	QZt5aH6KN	3DDAC18A2EAD61
Peanutbutter	Dani	111-22-3333	DNPA0101802U	D4c+k1c0t	7A7797AEACF4EBF

Forms Details Modify Search New Search Close

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5. If the results do not contain the client for whom you are searching, select **Modify Search** and edit your search criteria.

Main Menu

Search Results
Search results for criteria: First Name Like 'a', All Enrolled Clients.

Last Name	First Name	Client ID	Client URN	Client EURN	Client UCI
Bunnyrabbit	Janet	111-22-3333	JNBN0101652U	Art84QpwD	58A4B6B86778104
Butter	Peanut		PABT0101802U	Mt7wXDbl	0FBD97E4204FBA6
Grape	Apple		APGA0101922U	MmZe4aDIP	B2B998D3FCFB617
Green	Branch		BAGE0101802U	f5igQRqy8	00173F1CC18BA19
Grey	Sara	111-22-3333	SRGE0101802U	QZt5aH6KN	3DDAC18A2EAD61
Peanutbutter	Dani	111-22-3333	DNPA0101802U	D4c+k1c0t	7A7797AEACF4EBF

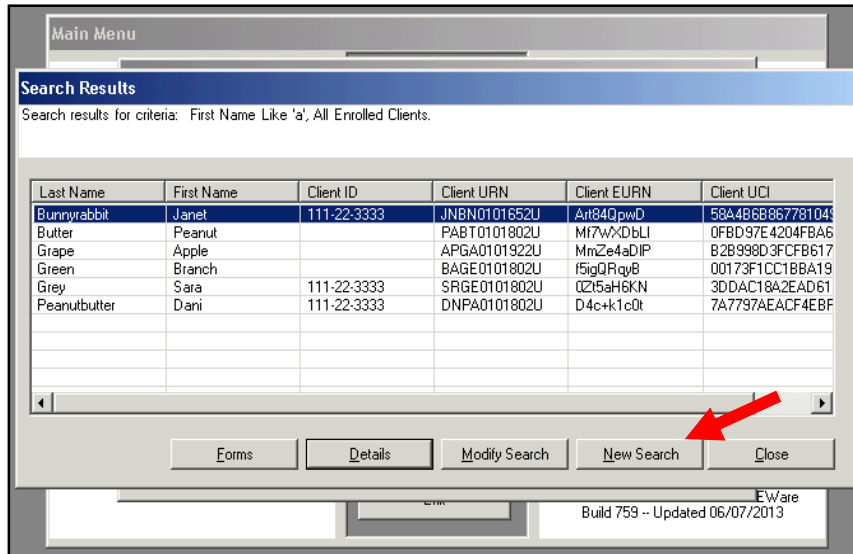
Forms Details Modify Search New Search Close

EWare
Build 759 -- Updated 06/07/2013

6. When conducting a search to verify that a client does not already exist in the database, input only a few letters of the last name and a letter or two of the first name. This will give you a greater chance of catching the client under a different spelling of the name. For example, if you type "Gray" in the **Last Name** field, you

would miss that the client could be in the system under the spelling of “Grey.” It is always better to put in fewer characters in the search because it improves your chances of finding the client under a different spelling of their name. This will reduce duplications in the system.

7. To start over, select **New Search**.



Main Menu

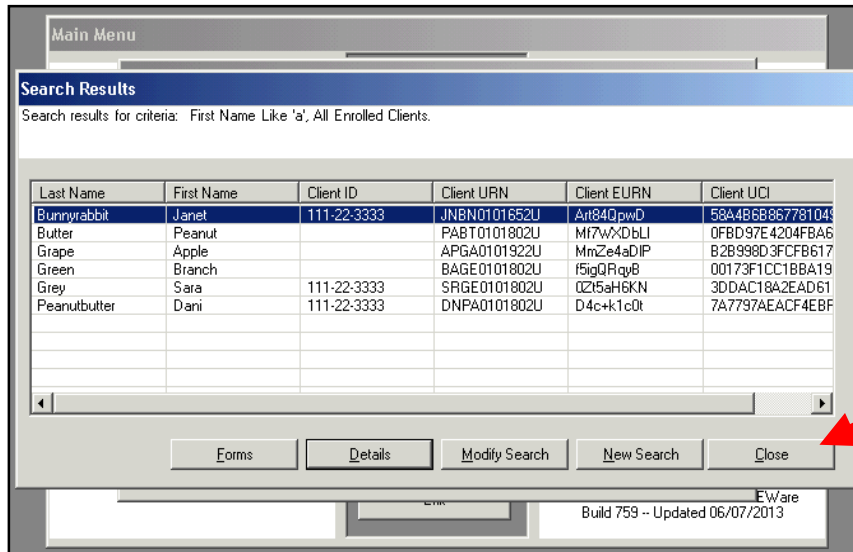
Search Results
Search results for criteria: First Name Like 'a', All Enrolled Clients.

Last Name	First Name	Client ID	Client URN	Client EURN	Client UCI
Bunnyrabbit	Janet	111-22-3333	JNBN0101652U	Art84QpwD	58A4B6B867781043
Butter	Peanut		PABT0101802U	M7wXDbLI	0FBD97E4204FBA6
Grape	Apple		APGA0101922U	MmZe4aDIP	B2B998D3FCF8617
Green	Branch		BAGE0101802U	f5igQRqy8	00173F1CC1BBA19
Grey	Sara	111-22-3333	SRGE0101802U	0Z15aH6KN	3DDAC18A2EAD61
Peanutbutter	Dani	111-22-3333	DNPA0101802U	D4c+k1c0t	7A7797AEACF4EBF

Forms Details Modify Search **New Search** Close

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8. To leave the search process, select **Close**.



Main Menu

Search Results
Search results for criteria: First Name Like 'a', All Enrolled Clients.

Last Name	First Name	Client ID	Client URN	Client EURN	Client UCI
Bunnyrabbit	Janet	111-22-3333	JNBN0101652U	Art84QpwD	58A4B6B867781043
Butter	Peanut		PABT0101802U	M7wXDbLI	0FBD97E4204FBA6
Grape	Apple		APGA0101922U	MmZe4aDIP	B2B998D3FCF8617
Green	Branch		BAGE0101802U	f5igQRqy8	00173F1CC1BBA19
Grey	Sara	111-22-3333	SRGE0101802U	0Z15aH6KN	3DDAC18A2EAD61
Peanutbutter	Dani	111-22-3333	DNPA0101802U	D4c+k1c0t	7A7797AEACF4EBF

Forms Details Modify Search New Search **Close**

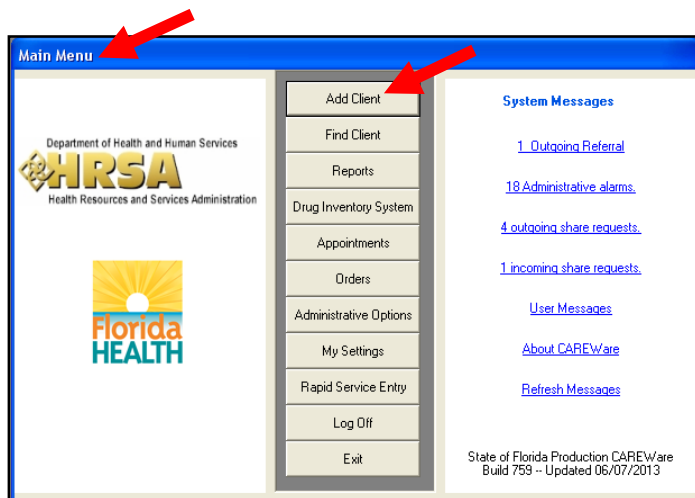
EWare
Build 759 -- Updated 06/07/2013

9. You can also access the **Find Client** function from the client screen (example below), by selecting **New Search**.

The screenshot shows a client record for 'Brontosaurus, Betty'. The interface includes a top navigation bar with buttons like 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Merge Client', 'Delete Client', 'Find List', 'New Search', and 'Close'. A red arrow points to the 'New Search' button. Below the navigation bar are tabs for 'Demographics', 'Drug Services', 'Service', 'Annual Review', 'Encounters', 'Referrals', 'HIV C&T', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', and 'Custom Tab 3'. The main area contains fields for 'First Name', 'Middle Name', 'Last Name', 'Client URN', 'Encrypted URN', 'Enrollment Status', 'Enrollment Date', 'Case Closed Date', 'Vital Status', and 'Date of Death'.

Part 6 – Adding a New Client

1. Before adding a new client, search the database to ensure the client has not already been entered into the system.
2. To add a new client, select **Add Client** from the **Main Menu**.



3. At the **Add Client** screen, enter the client's FULL LEGAL NAME, **Last Name** and **First Name**. Do not enter nicknames.

The screenshot shows the 'Add Client' form. Red arrows point to the title 'Add Client' at the top, and to the 'Last Name' and 'First Name' input fields. The 'Last Name' field contains 'Public' and the 'First Name' field contains 'Jack'. Other fields include 'Middle Name' with 'Q', 'Gender' with a dropdown set to 'Male', 'BirthDate' with '02/21/1970' and an 'Estimated?' checkbox, and 'Generated URN' with 'JCPB022170MU'. At the bottom are 'Add Client' and 'Cancel' buttons.

4. Enter the client's **Gender** and **Birth Date** in mm/dd/yyyy format. Once all the information is entered, click **Add Client**.

This screenshot is similar to the previous one but with additional red arrows. One arrow points to the 'Gender' dropdown menu, which is set to 'Male'. Another arrow points to the 'BirthDate' field, which contains '02/21/1970'. A third arrow points to the 'Add Client' button at the bottom. The other fields and the 'Generated URN' remain the same as in the previous screenshot.

5. CAREWare will create a **Generated URN** based on the first and third letters of the first name, the first and third letters of the last name, the date of birth, and a code for gender.

The screenshot shows the 'Add Client' form with the following data: Last Name: Public, First Name: Jack, Middle Name: Q, Gender: Male, BirthDate: 02/21/1970, Estimated?: ☐, and Generated URN: JCPB022170MU. A red arrow points to the 'Generated URN' field.

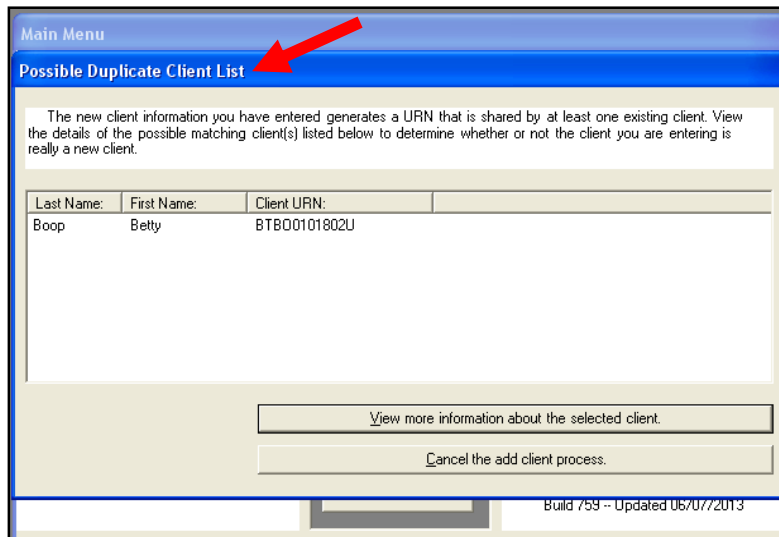
CAREWare uses the URN to determine if the client is already in the database and to generate an unduplicated client count for the state. Therefore, it is **very important** that all **Add Client** screen entries are accurate. Note the difference between the URNs in the two screens below for John Public and Jack Public.

The screenshot shows the 'Add Client' form with the following data: Last Name: Public, First Name: John, Middle Name: Q, Gender: Male, BirthDate: 02/21/1970, Estimated?: ☐, and Generated URN: JHPB022170MU. A red arrow points to the 'Generated URN' field.

The screenshot shows the 'Add Client' form with the following data: Last Name: Public, First Name: Jack, Middle Name: Q, Gender: Male, BirthDate: 02/21/1970, Estimated?: ☐, and Generated URN: JCPB022170MU. A red arrow points to the 'Generated URN' field.

Part 7 – Duplicate Clients and Duplicate URNs

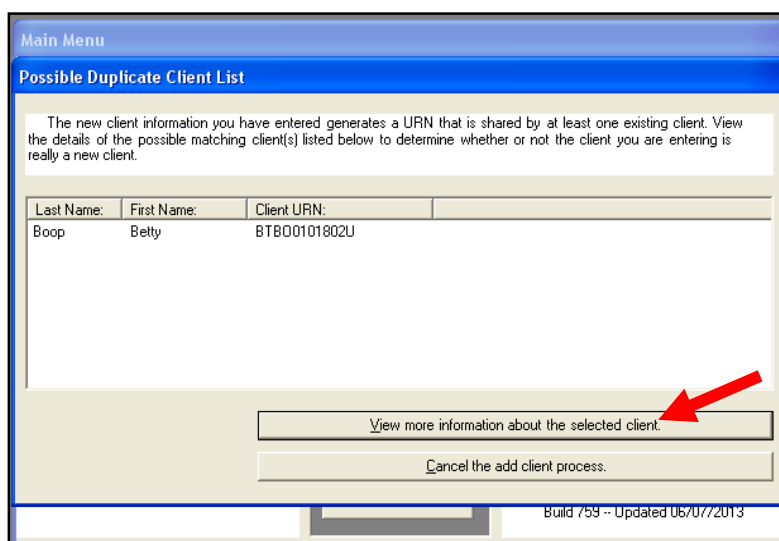
It is likely that a client will receive services from multiple providers within a network. It is also likely in a provider network with many clients that two individuals will have the same URN. If a provider enters the URN of a client who is new to them but has been seen by another provider and is already in the central database, the **Possible Duplicate Client List** screen will appear.



The screenshot shows a software window titled "Main Menu" with a sub-header "Possible Duplicate Client List". A red arrow points to this sub-header. Below the header, there is a text box explaining that the new client information generates a URN shared by at least one existing client. Below this is a table with three columns: "Last Name:", "First Name:", and "Client URN:". The table contains one row with the values "Boop", "Betty", and "BTB00101802U". At the bottom of the window, there are two buttons: "View more information about the selected client." and "Cancel the add client process.". The footer of the window indicates "Build 759 -- Updated 06/07/2013".

Last Name:	First Name:	Client URN:
Boop	Betty	BTB00101802U

1. Click **View more information about the selected client** to see if your new client is an existing client at another provider



This screenshot is identical to the one above, showing the "Possible Duplicate Client List" screen. However, a red arrow points to the "View more information about the selected client." button at the bottom of the window.

Last Name:	First Name:	Client URN:
Boop	Betty	BTB00101802U

2. The **Possible Duplicate Client Information** screen on the client will appear with three options.

Possible Duplicate Client Information.

URN Fields:

First Name: Middle Name: Last Name:

Date of Birth: Gender: Client URN:

Address Fields:

Address: City:

State: County: Zip Code: Phone Number:

Ethnicity:

☐ Hispanic ☒ Non-Hispanic ☐ Unknown

Race

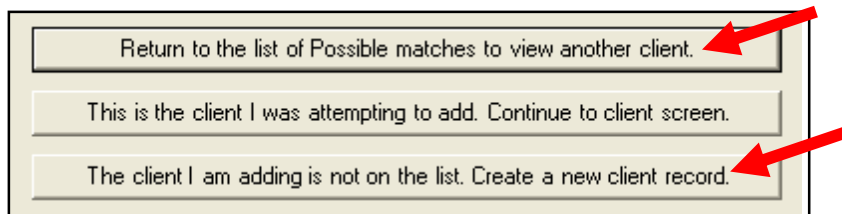
☐ White ☐ American Indian or Alaska Native ☐ Other

☐ Black or African American ☐ Native Hawaiian or Other Pacific Islander ☐ Unknown

☐ Asian

3. If, after a review of the demographic screen, you determine that this is the same client, select **This is the client I was attempting to add** and you'll be taken to that client's record.

4. If the client is not in the database, select either **Return to the list of possible matches** or **The client I am adding is not on the list. Create a new client record**.

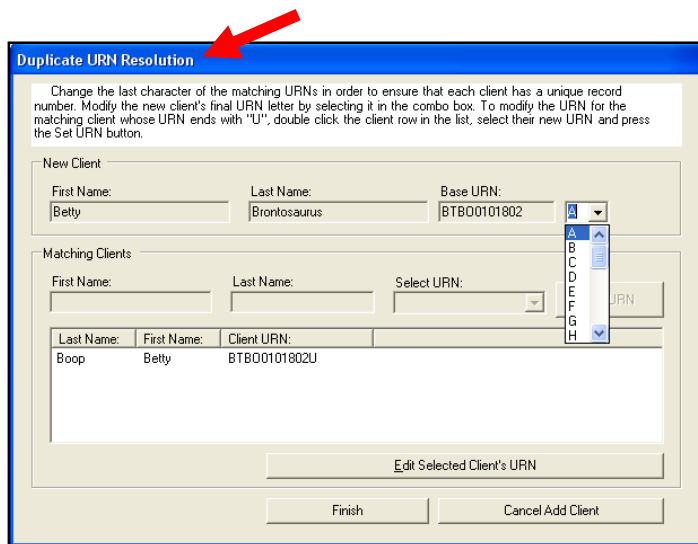


Return to the list of Possible matches to view another client.

This is the client I was attempting to add. Continue to client screen.

The client I am adding is not on the list. Create a new client record.

5. If you select **The client I am adding is not on the list. Create a new client record** option, the **Duplicate URN Resolution** screen will appear.



Duplicate URN Resolution

Change the last character of the matching URNs in order to ensure that each client has a unique record number. Modify the new client's final URN letter by selecting it in the combo box. To modify the URN for the matching client whose URN ends with "U", double click the client row in the list, select their new URN and press the Set URN button.

New Client

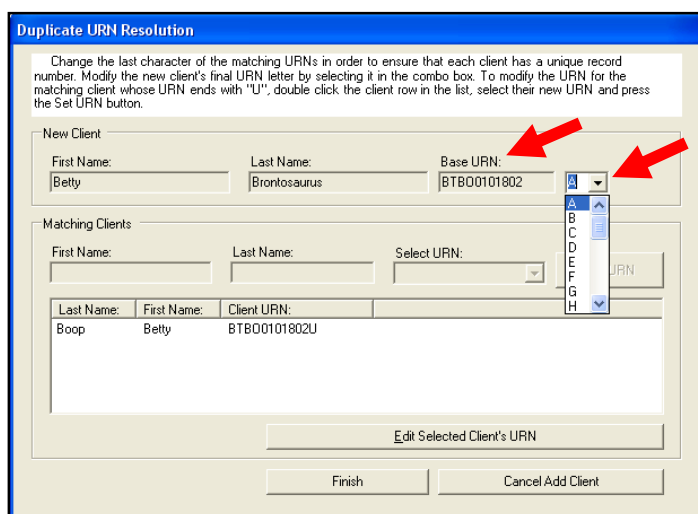
First Name: Last Name: Base URN:

Matching Clients

First Name: Last Name: Select URN:

Last Name	First Name	Client URN
Boop	Betty	BTB00101802U

6. Because the new client you were trying to add—Betty Brontosaurus—has the same URN as Betty Boop, you must add another character to the end of the URN to distinguish this client in the database. In this case, we've added the letter **A** in the drop-down menu next to **Base URN**. If that letter was already in use, then you could use **B**, and so on.



Duplicate URN Resolution

Change the last character of the matching URNs in order to ensure that each client has a unique record number. Modify the new client's final URN letter by selecting it in the combo box. To modify the URN for the matching client whose URN ends with "U", double click the client row in the list, select their new URN and press the Set URN button.

New Client

First Name: Last Name: Base URN:

Matching Clients

First Name: Last Name: Select URN:

Last Name	First Name	Client URN
Boop	Betty	BTB00101802U

- Click **Finish**. **NOTE:** All URNs in the database initially have the letter “U” placed at the end of the URN by default, as in the example below.

Duplicate URN Resolution

Change the last character of the matching URNs in order to ensure that each client has a unique record number. Modify the new client's final URN letter by selecting it in the combo box. To modify the URN for the matching client whose URN ends with "U", double click the client row in the list, select their new URN and press the Set URN button.

New Client

First Name: Last Name: Base URN:

Matching Clients

First Name: Last Name: Select URN:

Last Name	First Name	Client URN
Boop	Betty	BTB00101802U

Part 8 – Demographics

- After finding or adding a client, the file will open to the **Demographics** tab.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Middle Name: Client URN:

Last Name: Encrypted URN:

Gender: Date of Birth: Est? ☐

Sex at Birth: Encrypted UCI:

Client ID:

Street Address: ☒ Include on label report

City: State: Zip Code:

County: Phone Number:

Race(s): Asian Subgroup:

Ethnicity: Hispanic Subgroup:

Enrollment Status: Enrollment Date: Case Closed Date:

Vital Status: Date of Death:

HIV Status: HIV+ Date: Est? ☐ AIDS Date: Est? ☐

HIV Risk Factors:

Common Notes | Provider Notes | User Messages | Case Notes

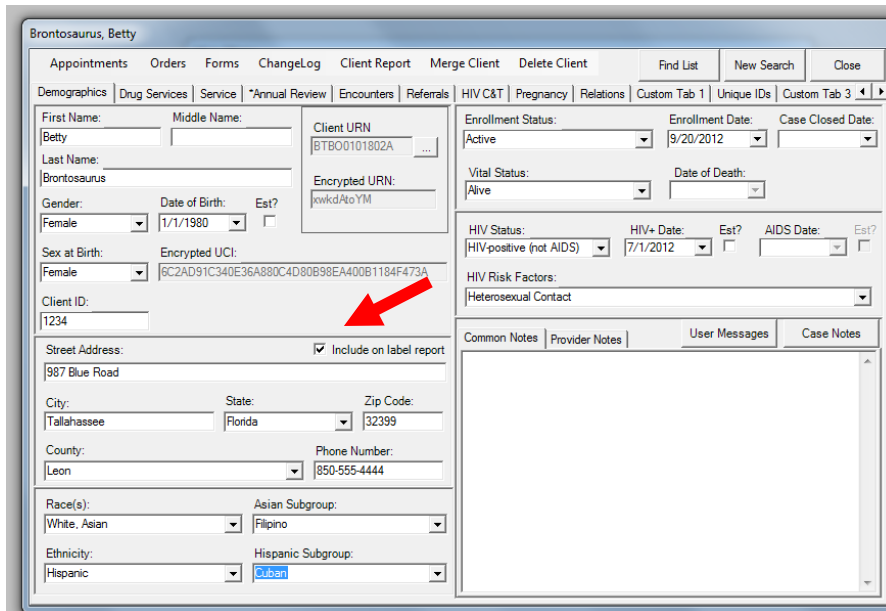
- a. **Client ID:** This field is for use at the local level. If your agency uses an internal client or chart number, enter it in this field. A client may have different values in the field at different agencies.

The screenshot shows a client record form for "Brontosaurus, Betty". The form includes various tabs at the top: Appointments, Orders, Forms, ChangeLog, Client Report, Merge Client, Delete Client, Find List, New Search, and Close. Below these are several tabs for different data categories: Demographics, Drug Services, Service, Annual Review, Encounters, Referrals, HIV C&T, Pregnancy, Relations, Custom Tab 1, Unique IDs, and Custom Tab 3. The Demographics tab is active, showing fields for First Name (Betty), Middle Name, Last Name (Brontosaurus), Gender (Female), Date of Birth (1/1/1980), Sex at Birth (Female), Client ID (1234), Street Address (987 Blue Road), City (Tallahassee), State (Florida), Zip Code (32399), County (Leon), Phone Number (850-555-4444), Race(s) (White, Asian), Asian Subgroup (Filipino), Ethnicity (Hispanic), and Hispanic Subgroup (Cuban). A red arrow points to the Client ID field.

- b. **Contact information:** Enter the client's **Address**, **City**, **State**, **Zip Code**, **County** and **Phone Number**. You must select "Florida" from the **State** drop-down menu before you can select the appropriate county.

This screenshot is identical to the one above, showing the same client record form for "Brontosaurus, Betty". A red arrow points to the Street Address field, which contains the value "987 Blue Road".

- c. **Include on label report:** This field is not checked by default, indicating that it is not permissible to use this client's name and address when running mailing labels from CAREWare. If the client wants to receive mail at their address, check this box.



Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty | Middle Name: | Client URN: BTB00101802A | Encrypted URN: jwkcdAtoYM

Last Name: Brontosaurus

Gender: Female | Date of Birth: 1/1/1980 | Est?: ☐

Sex at Birth: Female | Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A

Client ID: 1234

Street Address: 987 Blue Road | ☒ Include on label report

City: Tallahassee | State: Florida | Zip Code: 32399

County: Leon | Phone Number: 850-555-4444

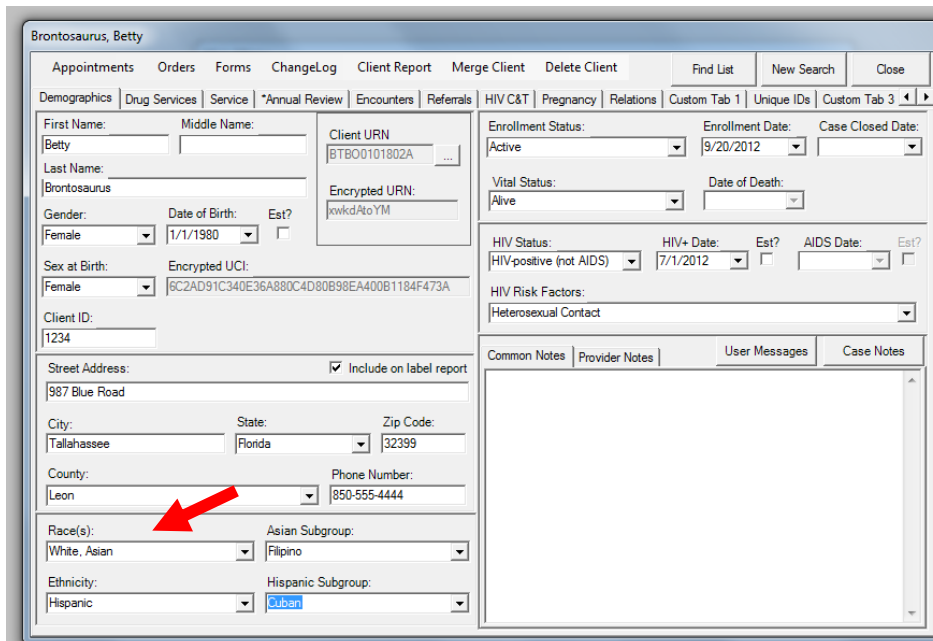
Race(s): White, Asian | Asian Subgroup: Filipino

Ethnicity: Hispanic | Hispanic Subgroup: Cuban

Enrollment Status: Active | Enrollment Date: 9/20/2012 | Case Closed Date: | Vital Status: Alive | Date of Death: | HIV Status: HIV-positive (not AIDS) | HIV+ Date: 7/1/2012 | Est?: ☐ | AIDS Date: | Est?: ☐ | HIV Risk Factors: Heterosexual Contact

Common Notes | Provider Notes | User Messages | Case Notes

- d. **Race:** Enter the client's self-reported race categories. If Asian is selected, make sure to enter the Asian Subgroup.



Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty | Middle Name: | Client URN: BTB00101802A | Encrypted URN: jwkcdAtoYM

Last Name: Brontosaurus

Gender: Female | Date of Birth: 1/1/1980 | Est?: ☐

Sex at Birth: Female | Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A

Client ID: 1234

Street Address: 987 Blue Road | ☒ Include on label report

City: Tallahassee | State: Florida | Zip Code: 32399

County: Leon | Phone Number: 850-555-4444

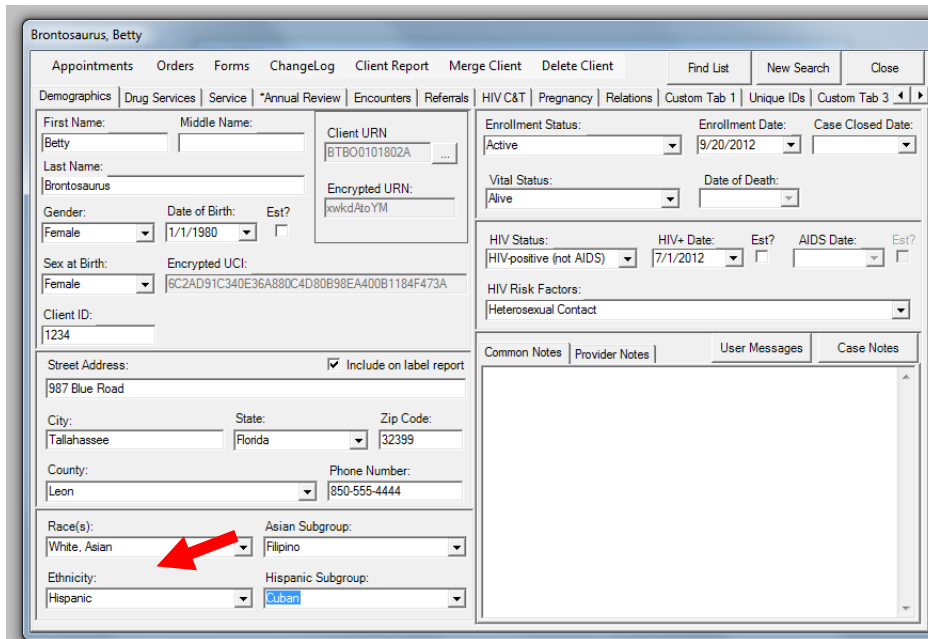
Race(s): White, Asian | Asian Subgroup: Filipino

Ethnicity: Hispanic | Hispanic Subgroup: Cuban

Enrollment Status: Active | Enrollment Date: 9/20/2012 | Case Closed Date: | Vital Status: Alive | Date of Death: | HIV Status: HIV-positive (not AIDS) | HIV+ Date: 7/1/2012 | Est?: ☐ | AIDS Date: | Est?: ☐ | HIV Risk Factors: Heterosexual Contact

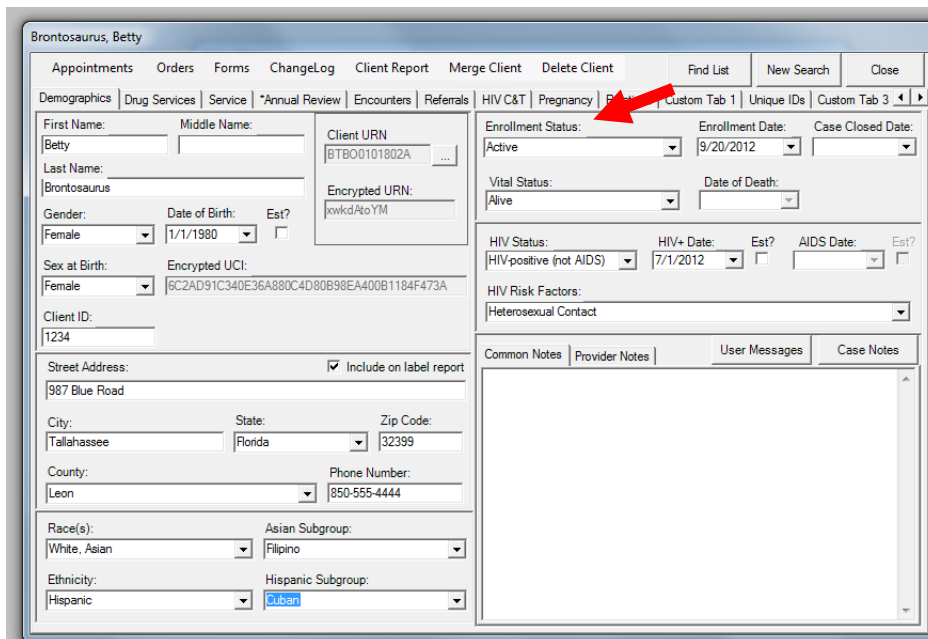
Common Notes | Provider Notes | User Messages | Case Notes

- e. **Ethnicity:** Enter the client's self-reported ethnicity (Hispanic or non-Hispanic). If Hispanic is selected, make sure to enter the Hispanic Subgroup.



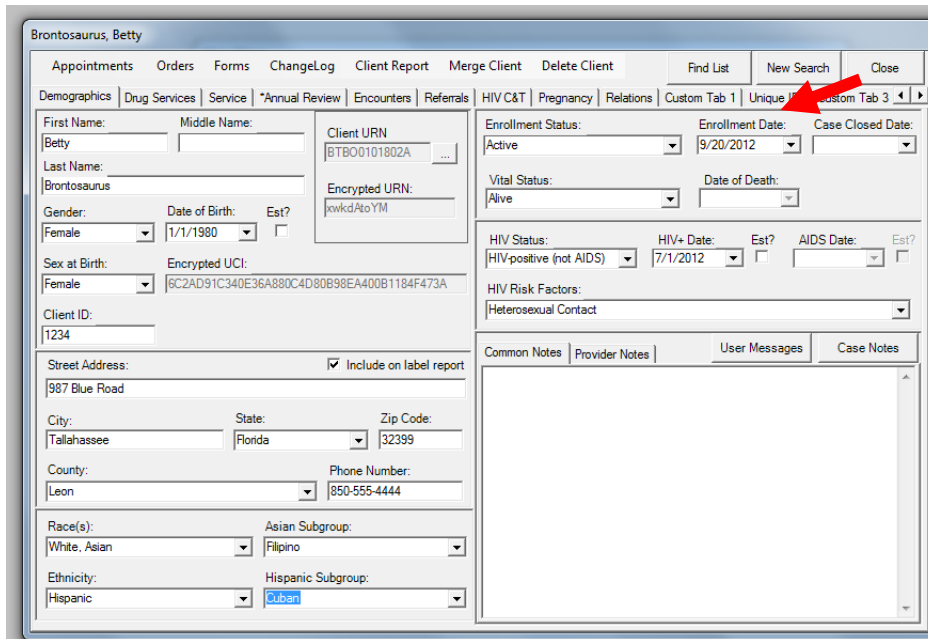
The screenshot shows the 'Brontosaurus, Betty' client form. The 'Ethnicity' dropdown menu is highlighted with a red arrow, showing 'Hispanic' selected. The 'Hispanic Subgroup' dropdown menu is also visible, showing 'Cuban' selected. Other fields include First Name (Betty), Last Name (Brontosaurus), Gender (Female), Date of Birth (1/1/1980), Client URN (BTBO0101802A), Encrypted URN (jowkdAtoYM), Encrypted UCI (6C2AD91C340E36A880C4D80B98EA400B1184F473A), Client ID (1234), Street Address (987 Blue Road), City (Tallahassee), State (Florida), Zip Code (32399), County (Leon), Phone Number (850-555-4444), Race(s) (White, Asian), Asian Subgroup (Filipino), Enrollment Status (Active), Enrollment Date (9/20/2012), Case Closed Date, Vital Status (Alive), Date of Death, HIV Status (HIV-positive (not AIDS)), HIV+ Date (7/1/2012), Est? (checkbox), AIDS Date, Est? (checkbox), HIV Risk Factors (Heterosexual Contact), and tabs for Common Notes, Provider Notes, User Messages, and Case Notes.

- f. **Enrl Status:** Indicate the client's enrollment status.



The screenshot shows the 'Brontosaurus, Betty' client form. The 'Enrollment Status' dropdown menu is highlighted with a red arrow, showing 'Active' selected. Other fields include First Name (Betty), Last Name (Brontosaurus), Gender (Female), Date of Birth (1/1/1980), Client URN (BTBO0101802A), Encrypted URN (jowkdAtoYM), Encrypted UCI (6C2AD91C340E36A880C4D80B98EA400B1184F473A), Client ID (1234), Street Address (987 Blue Road), City (Tallahassee), State (Florida), Zip Code (32399), County (Leon), Phone Number (850-555-4444), Race(s) (White, Asian), Asian Subgroup (Filipino), Ethnicity (Hispanic), Hispanic Subgroup (Cuban), Enrollment Date (9/20/2012), Case Closed Date, Vital Status (Alive), Date of Death, HIV Status (HIV-positive (not AIDS)), HIV+ Date (7/1/2012), Est? (checkbox), AIDS Date, Est? (checkbox), HIV Risk Factors (Heterosexual Contact), and tabs for Common Notes, Provider Notes, User Messages, and Case Notes.

- g. **Enrl Date**: The enrollment date should be equal to the date of the first service the client received at the agency.



Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

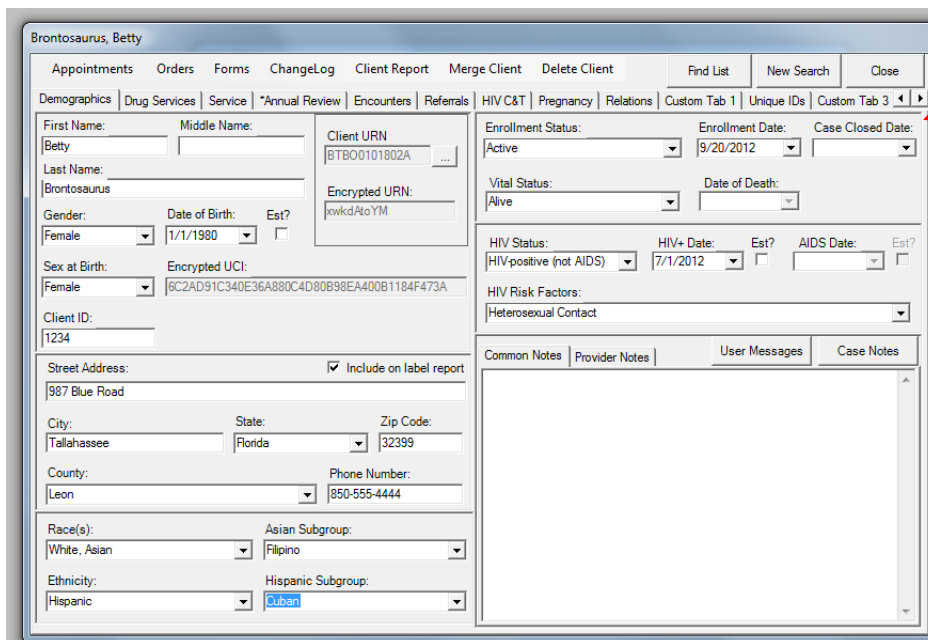
Demographics | Drug Services | Service | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty Middle Name: Client URN: BTBO0101802A
 Last Name: Brontosaurus Encrypted URN: jwkdAtoYM
 Gender: Female Date of Birth: 1/1/1980 Est? ☐
 Sex at Birth: Female Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A
 Client ID: 1234
 Street Address: 987 Blue Road Include on label report ☒
 City: Tallahassee State: Florida Zip Code: 32399
 County: Leon Phone Number: 850-555-4444
 Race(s): White, Asian Asian Subgroup: Filipino
 Ethnicity: Hispanic Hispanic Subgroup: Cuban

Enrollment Status: Active Enrollment Date: 9/20/2012 Case Closed Date:
 Vital Status: Alive Date of Death:
 HIV Status: HIV+ Date: 7/1/2012 Est? AIDS Date: Est?
 HIV Risk Factors: Heterosexual Contact

Common Notes | Provider Notes | User Messages | Case Notes

- h. **Case Closed**: If the enrollment status is any option other than **Active**, add a **Case Closed** date.



Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty Middle Name: Client URN: BTBO0101802A
 Last Name: Brontosaurus Encrypted URN: jwkdAtoYM
 Gender: Female Date of Birth: 1/1/1980 Est? ☐
 Sex at Birth: Female Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A
 Client ID: 1234
 Street Address: 987 Blue Road Include on label report ☒
 City: Tallahassee State: Florida Zip Code: 32399
 County: Leon Phone Number: 850-555-4444
 Race(s): White, Asian Asian Subgroup: Filipino
 Ethnicity: Hispanic Hispanic Subgroup: Cuban

Enrollment Status: Active Enrollment Date: 9/20/2012 Case Closed Date:
 Vital Status: Alive Date of Death:
 HIV Status: HIV+ Date: 7/1/2012 Est? AIDS Date: Est?
 HIV Risk Factors: Heterosexual Contact

Common Notes | Provider Notes | User Messages | Case Notes

- i. **Vital Status:** Indicate the vital status—**Alive** or **Deceased**—of the client.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service *Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

First Name: Betty Middle Name: Client URN: BTBO0101802A
Last Name: Brontosaurus Encrypted URN: jwkdaToYM
Gender: Female Date of Birth: 1/1/1980 Est? ☐
Sex at Birth: Female Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A
Client ID: 1234
Street Address: 987 Blue Road Include on label report ☒
City: Tallahassee State: Florida Zip Code: 32399
County: Leon Phone Number: 850-555-4444
Race(s): White, Asian Asian Subgroup: Filipino
Ethnicity: Hispanic Hispanic Subgroup: Cuban

Enrollment Status: Active Enrollment Date: 9/20/2012 Case Closed Date:
Vital Status: Alive Date of Death:
HIV Status: HIV-positive (not AIDS) HIV+ Date: 7/1/2012 Est? ☐ AIDS Date: Est? ☐
HIV Risk Factors: Heterosexual Contact

Common Notes Provider Notes User Messages Case Notes

- j. **Date of Death:** If the client's vital status is **Deceased**, input the date of death.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service *Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

First Name: Betty Middle Name: Client URN: BTBO0101802A
Last Name: Brontosaurus Encrypted URN: jwkdaToYM
Gender: Female Date of Birth: 1/1/1980 Est? ☐
Sex at Birth: Female Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A
Client ID: 1234
Street Address: 987 Blue Road Include on label report ☒
City: Tallahassee State: Florida Zip Code: 32399
County: Leon Phone Number: 850-555-4444
Race(s): White, Asian Asian Subgroup: Filipino
Ethnicity: Hispanic Hispanic Subgroup: Cuban

Enrollment Status: Active Enrollment Date: 9/20/2012 Case Closed Date:
Vital Status: Alive Date of Death:
HIV Status: HIV-positive (not AIDS) HIV+ Date: 7/1/2012 Est? ☐ AIDS Date: Est? ☐
HIV Risk Factors: Heterosexual Contact

Common Notes Provider Notes User Messages Case Notes

- k. **HIV Status:** Enter the client's current HIV status from among the options in the drop-down menu.

The screenshot shows the 'Brontosaurus, Betty' client form. The 'HIV Status' field is highlighted with a red arrow. The form includes various fields for demographic information, enrollment status, and medical history.

First Name: Betty	Middle Name:	Client URN: BTBO0101802A	Enrollment Status: Active	Enrollment Date: 9/20/2012	Case Closed Date:
Last Name: Brontosaurus		Encrypted URN: jowkdAtoYM	Vital Status: Alive	Date of Death:	
Gender: Female	Date of Birth: 1/1/1980	Est?: <input type="checkbox"/>	HIV Status: HIV-positive (not AIDS)	HIV+ Date: 7/1/2012	Est?: <input type="checkbox"/>
Sex at Birth: Female	Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A		AIDS Date:	Est?: <input type="checkbox"/>	
Client ID: 1234			HIV Risk Factors: Heterosexual Contact		

- l. **HIV+ Date:** Enter the date the client was identified as HIV-positive. If the date is an estimate, check the **Est?** box.

The screenshot shows the 'Brontosaurus, Betty' client form. The 'HIV+ Date' field is highlighted with a red arrow. The form includes various fields for demographic information, enrollment status, and medical history.

First Name: Betty	Middle Name:	Client URN: BTBO0101802A	Enrollment Status: Active	Enrollment Date: 9/20/2012	Case Closed Date:
Last Name: Brontosaurus		Encrypted URN: jowkdAtoYM	Vital Status: Alive	Date of Death:	
Gender: Female	Date of Birth: 1/1/1980	Est?: <input type="checkbox"/>	HIV Status: HIV-positive (not AIDS)	HIV+ Date: 7/1/2012	Est?: <input type="checkbox"/>
Sex at Birth: Female	Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A		AIDS Date:	Est?: <input type="checkbox"/>	
Client ID: 1234			HIV Risk Factors: Heterosexual Contact		

- m. **AIDS Date:** Enter the date the client was diagnosed with AIDS. If the date is an estimate, check the **Est?** box.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service *Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

First Name: Betty Middle Name: Client URN: BTB00101802A
 Last Name: Brontosaurus Encrypted URN: jowkdAtoYM
 Gender: Female Date of Birth: 1/1/1980 Est? ☐
 Sex at Birth: Female Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A
 Client ID: 1234
 Street Address: 987 Blue Road Include on label report ☒
 City: Tallahassee State: Florida Zip Code: 32399
 County: Leon Phone Number: 850-555-4444
 Race(s): White, Asian Asian Subgroup: Filipino
 Ethnicity: Hispanic Hispanic Subgroup: Cuban

Enrollment Status: Active Enrollment Date: 9/20/2012 Case Closed Date:
 Vital Status: Alive Date of Death:
 HIV Status: HIV+ Date: 7/1/2012 Est? ☐ AIDS Date: Est? ☐
 HIV Risk Factors: Heterosexual Contact

Common Notes Provider Notes User Messages Case Notes

- n. **HIV Risk Factors:** Check all the boxes that apply for HIV risk factors (modes of HIV transmission to the client).

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service *Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

First Name: Betty Middle Name: Client URN: BTB00101802A
 Last Name: Brontosaurus Encrypted URN: jowkdAtoYM
 Gender: Female Date of Birth: 1/1/1980 Est? ☐
 Sex at Birth: Female Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A
 Client ID: 1234
 Street Address: 987 Blue Road Include on label report ☒
 City: Tallahassee State: Florida Zip Code: 32399
 County: Leon Phone Number: 850-555-4444
 Race(s): White, Asian Asian Subgroup: Filipino
 Ethnicity: Hispanic Hispanic Subgroup: Cuban

Enrollment Status: Active Enrollment Date: 9/20/2012 Case Closed Date:
 Vital Status: Alive Date of Death:
 HIV Status: HIV+ Date: 7/1/2012 Est? ☐ AIDS Date: Est? ☐
 HIV Risk Factors: Heterosexual Contact

Common Notes Provider Notes User Messages Case Notes

- o. The **Common Notes** field can be used to collect additional information about the client. The information in this field is available to any agency that serves the client.

The screenshot shows a client record for "Brontosaurus, Betty". The form is divided into several sections. On the left, there are fields for personal information: First Name (Betty), Middle Name, Last Name (Brontosaurus), Gender (Female), Date of Birth (1/1/1980), Sex at Birth (Female), Encrypted UCI, Client ID (1234), Street Address (987 Blue Road), City (Tallahassee), State (Florida), Zip Code (32399), County (Leon), and Phone Number (850-555-4444). On the right, there are fields for clinical information: Enrollment Status (Active), Enrollment Date (9/20/2012), Case Closed Date, Vital Status (Alive), Date of Death, HIV Status (HIV-positive (not AIDS)), HIV+ Date (7/1/2012), AIDS Date, and HIV Risk Factors (Heterosexual Contact). A red arrow points to the "Common Notes" tab, which is currently selected. The "Common Notes" field is empty.

- p. The **Provider Notes** field can be used to collect additional information about the client. The information in this field is only available to the agency entering the data.

This screenshot is identical to the one above, showing the client record for "Brontosaurus, Betty". The only difference is that the red arrow now points to the "Provider Notes" tab, which is currently selected. The "Provider Notes" field is empty.

- q. To input multiple notes that are viewable only by your agency, use **Case Notes**.
NOTE: If you are entering a long series of case notes at one sitting for one client, it is advisable to save your changes after each paragraph or risk losing the entered notes.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | *Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

First Name: Betty | Middle Name: | Last Name: Brontosaurus | Client URN: BTB00101802A | Encrypted URN: jwkdAoYM

Gender: Female | Date of Birth: 1/1/1980 | Est? | Enrollment Status: Active | Enrollment Date: 9/20/2012 | Case Closed Date: | Vital Status: Alive | Date of Death: | HIV Status: HIV-positive (not AIDS) | HIV+ Date: 7/1/2012 | Est? | AIDS Date: | Est? | HIV Risk Factors: Heterosexual Contact

Sex at Birth: Female | Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A | Client ID: 1234

Street Address: 987 Blue Road | Include on label report | City: Tallahassee | State: Florida | Zip Code: 32399 | County: Leon | Phone Number: 850-555-4444

Race(s): White, Asian | Asian Subgroup: Filipino | Ethnicity: Hispanic | Hispanic Subgroup: Cuban

Common Notes | Provider Notes | User Messages | Case Notes

Case Notes

1. Select the **Case Notes** button, which will take you to the **Case Notes (Rapid Entry)** screen. Click on the **Add** button. This will allow you to add a new case note.

Case Notes (Rapid Entry)

Client: Brontosaurus, Betty | From: 11/4/2012 | Through: 11/4/2013 | Templates | Report | Sharing | Close

☒ Only show this provider

Note: | Date: | Author: | Add Service | Save | Cancel | Paste Template | Spell Check | Thesaurus

Search | 0 / 0

Date	Provider	Case Note	Author

Add | Edit | Append | Delete

2. After adding the Case Note, choose the date of the note by clicking on the **Date** drop-down menu. Select **Save** when completed. Also note the **Paste Template** option below the **Cancel** button. Clicking on this button will allow you to save a standard Case Note that you can use repeatedly without having to retype the same language.

Case Notes (Rapid Entry)

Client: Brontosaurus, Betty

From: 11/5/2012 Through: 11/5/2013

☒ Only show this provider

Templates Report

Sharing Close

Note:

Client is changing primary medical care due to relocating.

Date: 11/4/2013

Author:

☐ Add Service

Save

Cancel

Paste Template

Spell Check

Thesaurus

Search

1 / 1

Date	Provider	Case Note	Author
------	----------	-----------	--------

Add

Edit

Append

Delete

3. On the **Case Notes Template Setup** screen, select **New**.

Case Notes Template Setup

Case Notes Templates

Template Name
update

New Edit Delete

Close

Add/Edit Case Note Template

Case Note Template Name:

Case Note Template Text:

Save Cancel

4. Add a **Case Note Template Name** and **Case Note Template Text**. Select **Save**.

The screenshot shows the 'Case Notes Template Setup' dialog box. On the left, the 'Case Notes Templates' list contains one entry: 'update'. On the right, the 'Add/Edit Case Note Template' section has two fields: 'Case Note Template Name' with the text 'HOPWA Rent' and 'Case Note Template Text' with the text 'Client came in for monthly rent assistance. Assisted by case manager Tommy Rainbow.'. At the bottom right, there are 'Save' and 'Cancel' buttons. Red arrows point to the 'Case Note Template Name' field, the 'Case Note Template Text' field, and the 'Save' button.

5. **Case Note Templates** will appear on the left side of the screen. **NOTE:** If you need to adjust a template, select **Edit**. If you need to remove a template, select **Delete**. Select **Close** to leave the screen.

The screenshot shows the 'Case Notes Template Setup' dialog box. On the left, the 'Case Notes Templates' list now contains two entries: 'update' and 'HOPWA Rent'. On the right, the 'Add/Edit Case Note Template' section is empty. At the bottom left, there are four buttons: 'New', 'Edit', 'Delete', and 'Close'. Red arrows point to each of these four buttons.

6. To add a **Case Note Template**, select **Paste Template** after hitting **Add** on the **Case Note** screen.

Case Notes (Rapid Entry)

Client: Brontosaurus, Betty From: 11/5/2012 Through: 11/5/2013

☒ Only show this provider

Templates Report Sharing Close

Note:

Date: 11/4/2013

Author:

☐ Add Service

Save Cancel Paste Template Spell Check Thesaurus

Search 1 / 1

Date	Provider	Case Note	Author
11/4/2013	Jeffrey Storm's Plaything W/on...	Client is changing primary med...	

Add Edit Append Delete

7. Choose the **Template Name** you want to use and select **Paste**.

Case Note Template Select

Please choose a case note template to paste to case note.

Template Name	Template Text
update	cl came to the office a...
HOPWA Rent	Client came in for mont...


Paste Cancel

8. **Save** the template. The Case Note Template is added to the client record.

Case Notes (Rapid Entry)

Client: From: Through:
☒ Only show this provider

Note:

Date:
Author:
☐ Add Service 

Search 0 / 0

#	Date	Provider	Case Note	Author

Part 9 – Service

1. From the client's details screen, select the **Service** tab.

Brontosaurus, Betty

Appointments Orders Forms **Service** ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services **Service** *Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

First Name: Betty Middle Name: Client URN: 6T800101802A
Last Name: Brontosaurus Encrypted URN: jwkdPtoTM
Gender: Female Date of Birth: 1/1/1980
Sex at Birth: Female Encrypted UCI: 6C2AD91C340E36A880C4D80B98EA400B1184F473A
Client ID: 1234
Street Address: 987 Blue Road
City: Tallahassee State: Florida Zip Code: 32399
County: Leon Phone Number: 850-555-4444
Race(s): White, Asian Asian Subgroup: Filipino
Ethnicity: Hispanic Hispanic Subgroup: Cuban

Enrollment Status: Active Enrollment Date: 9/20/2012 Case Closed Date:
Vital Status: Alive Date of Death:
HIV Status: HIV-positive (AIDS status) HIV+ Date: 7/1/2012 AIDS Date:
HIV Risk Factors: Heterosexual Contact

Common Notes Provider Notes User Messages Case Notes

2. Click on the **New Service** button to begin entering a new service.

Brontosaurus, Betty

Appointments Orders Forms **Service** ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services **Service** *Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Year: 2015

Add/Edit Service Details

Date: Service Name: Contract: Units: Price: Cost:

Amount Received Save Cancel Print

Search 0 / 0

Date	Service Name	Contract	Units	Total	Received	Provider
------	--------------	----------	-------	-------	----------	----------

Service Sharing Preview Services **New Service** Edit Service Delete Service

3. Enter the **Date** of the service. You can do this manually using the mm/dd/yyyy format or by selecting a date from the drop-down calendar.

The screenshot shows the 'Brontosaurus, Betty' application window. The 'Service' tab is selected in the top menu. The 'Add/Edit Service Details' form is displayed. A red arrow points to the 'Date' field, which is a drop-down menu. Below the form is a search bar and a table with columns: Date, Service Name, Contract, Units, Total, Received, and Provider. At the bottom are buttons for 'Service Sharing', 'Preview Services', 'New Service', 'Edit Service', and 'Delete Service'.

4. Enter the **Service Name**. You can use the drop-down menu or type the first few letters of the service.

This screenshot is similar to the previous one, but the red arrow points to the 'Service Name' field, which is a drop-down menu. The rest of the interface, including the search bar, table, and bottom buttons, remains the same.

5. Enter the **Contract** that funds the service. The contracts under which this service can be provided will be displayed on the drop-down menu. If your agency has a single contract to provide the service you selected, only that contract name will appear.

The screenshot shows the 'Brontosaurus, Betty' software window. The 'Add/Edit Service Details' form is active. The 'Year' is set to 2015. The 'Contract' field is highlighted with a red arrow. Below the form is a table with columns: Date, Service Name, Contract, Units, Total, Received, and Provider. The table is currently empty. At the bottom of the window are buttons for 'Service Sharing', 'Preview Services', 'New Service', 'Edit Service', and 'Delete Service'.

6. The number of **Units**, **Price** and **Cost**, if any, is set by default when the contract is entered into CAREWare. Unit cost is for internal use; it is not a required field. If tracked, your agency will be able to keep a detailed accounting of service costs. Both fields may be adjusted from the default values if necessary.

The screenshot shows the 'Brontosaurus, Betty' software window. The 'Add/Edit Service Details' form is active. The 'Year' is set to 2015. The 'Units', 'Price', and 'Cost' fields are highlighted with red arrows. Below the form is a table with columns: Date, Service Name, Contract, Units, Total, Received, and Provider. The table is currently empty. At the bottom of the window are buttons for 'Service Sharing', 'Preview Services', 'New Service', 'Edit Service', and 'Delete Service'.

7. Click the **Save** button when finished entering data.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services **Service** *Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Year: 2015

Add/Edit Service Details

Date: 1/1/2015 Service Name: Ambulatory/Outpatient Medical Care Contract: Hills 09823 Units: 1 Price: \$0.00 Cost: \$0.00

Amount Received Save Cancel Print

8. Additional field on the **Service** tab:

- a. **Year:** CAREWare separates services by year. If you want to see what services the client received in another year, choose that year in the drop-down menu.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services **Service** *Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Year: 2015

Add/Edit Service Details

Date: Service Name: Contract: Units: Price: Cost:

Amount Received Save Cancel Print

Search 0 / 0

Date	Service Name	Contract	Units	Total	Received	Provider
1/1/2015	Ambulatory/Outpatient Medical Care	Hills 09823	1	\$0.00	\$0.00	Jeffrey Stor...

Service Sharing Preview Services New Service Edit Service Delete Service

Part 10 – Annual Review

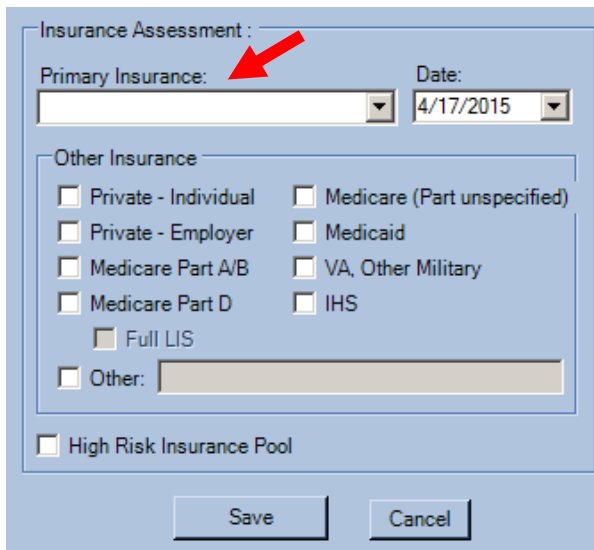
- From the client's details screen, select the **Annual Review** tab, then the **Annual** sub-tab.

The left screenshot shows the 'Brontosaurus, Betty' client details screen. The 'Annual Review' tab is selected, and the 'Annual' sub-tab is also selected. The right screenshot shows the 'Insurance' section with the 'Add', 'Edit', and 'Delete' buttons highlighted by red arrows.

- Insurance:** Indicate the client's primary insurance provider, if any. Click on the **+** in the upper right corner of the **Insurance** field (it will appear when the cursor hovers near the date). Or, you can select the blue **Add** hyperlink on the right. Both options work the same. If you have to adjust an existing Insurance record, select the record and click on **Edit**. If you have to remove an existing Insurance record, select the record and click on **Delete**. These actions are the same for all of the **Annual Review** options.

The screenshot shows the 'Brontosaurus, Betty' client details screen. The 'Insurance' section is highlighted, and the 'Add', 'Edit', and 'Delete' buttons are highlighted by red arrows. The 'Insurance' section includes fields for Primary Insurance, Other Insurance, Federal Poverty Level, and Annual Screening.

- The **Insurance Assessment** screen will appear with a **Primary Insurance** drop-down menu that contains the most common types of insurance, such as **Medicaid** or **Private - Insurance**. Similar options are available for **Other Insurance**.

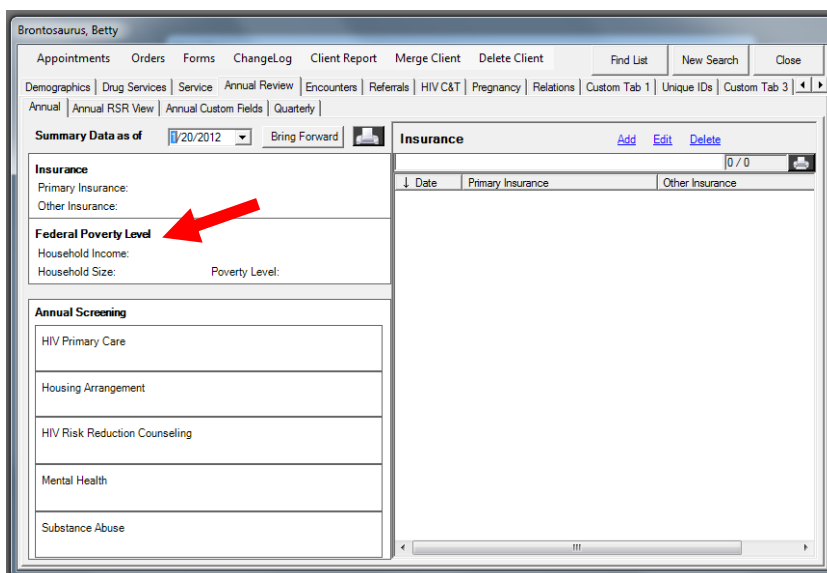


The **Insurance Assessment** dialog box is shown. It has a title bar and a main area with the following elements:

- Primary Insurance:** A drop-down menu with a red arrow pointing to it.
- Date:** A date field showing 4/17/2015.
- Other Insurance:** A section containing several checkboxes:
 - ☐ Private - Individual
 - ☐ Private - Employer
 - ☐ Medicare Part A/B
 - ☐ Medicare Part D
 - ☐ Full LIS
 - ☐ Other: [text field]
 - ☐ Medicare (Part unspecified)
 - ☐ Medicaid
 - ☐ VA, Other Military
 - ☐ IHS
- ☐ High Risk Insurance Pool
- Buttons:** Save and Cancel.

Note: Clients with insurance plans purchased through the Federal Marketplace should be coded as Private-Individual.

- Federal Poverty Level:** Indicate the total household income and number in household. CAREWare will calculate the client's Federal Poverty Level.



The screenshot shows the client record for **Brontosaurus, Betty**. The **Insurance** tab is selected, and the **Federal Poverty Level** section is highlighted with a red arrow. The **Insurance** section shows a table with columns for Date, Primary Insurance, and Other Insurance. The **Annual Screening** section shows a list of screening items: HIV Primary Care, Housing Arrangement, HIV Risk Reduction Counseling, Mental Health, and Substance Abuse.

5. Annual Screening

- a. **HIV Primary Care**: Indicate where the client receives his or her primary medical care. Click on the **+** in the upper right corner of the **HIV Primary Care** field (it will appear when the cursor hovers near the date).

The screenshot shows the 'Brontosaurus, Betty' software interface. The 'Annual Screening' section is highlighted with a red arrow. It contains a table with the following rows:

Annual Screening
HIV Primary Care
Housing Arrangement
HIV Risk Reduction Counseling
Mental Health
Substance Abuse

- b. The **Annual Screening** screen will appear with drop-down menus for the **Date**, **Type** and **Result**. In the **Type** menu, choose **HIV Primary Care**. **Save** your entries.

The screenshot shows the 'Annual Screening' dialog box. It contains three drop-down menus: 'Date' (set to 11/4/2013), 'Type' (set to HIV Primary Care), and 'Result'. A red arrow points to the 'Date' field, another to the 'Type' field, and a third to the 'Result' field. A fourth red arrow points to the 'Save' button at the bottom.

- c. **Housing Arrangement**: Indicate the client's housing status. Click on the **+** in the upper right corner of the **Housing Arrangement** field (it will appear when the cursor hovers near the date).

The screenshot shows the 'Brontosaurus, Betty' client record interface. The 'Annual Screening' section is highlighted with a red arrow pointing to the 'Housing Arrangement' field. The interface includes a top menu bar with options like 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Merge Client', and 'Delete Client'. Below this is a 'Summary Data as of' section with a date dropdown set to '11/20/2012'. The 'Insurance' section is also visible, showing a table with columns for 'Date', 'Primary Insurance', and 'Other Insurance'.

- d. The **Annual Screening** screen will appear with drop-down menus for the **Date**, **Type** and **Result**. In the **Type** menu, choose **Housing Arrangement**. **Save** your entries.

The screenshot shows the 'Annual Screening' dialog box. It contains three dropdown menus: 'Date' (set to '11/4/2013'), 'Type' (set to 'Housing Arrangement'), and 'Result' (empty). Red arrows point to each of these dropdown menus and the 'Save' button at the bottom. The 'Cancel' button is also visible next to the 'Save' button.

- e. **HIV Risk Reduction Counseling**: Indicate if the client received HIV risk reduction counseling. Click on the **+** in the upper right corner of the **HIV Risk Reduction Counseling** field (it will appear when the cursor hovers near the date).

The screenshot shows the 'Brontosaurus, Betty' client record form. The 'Annual Screening' section is highlighted with a red arrow pointing to the 'HIV Risk Reduction Counseling' field. The form includes sections for Insurance, Federal Poverty Level, and Annual Screening. The 'Annual Screening' section has a table with the following rows: HIV Primary Care, Housing Arrangement, HIV Risk Reduction Counseling, Mental Health, and Substance Abuse. The 'HIV Risk Reduction Counseling' field is highlighted with a red arrow.

- f. The **Annual Screening** screen will appear with drop-down menus for the **Date**, **Type**, **Result** and **Counseled by**. In the **Type** menu, choose **HIV Risk Reduction Counseling**. **Save** your entries.

The screenshot shows the 'Annual Screening' dialog box. It contains four drop-down menus: Date (set to 11/4/2013), Type (set to HIV Risk Reduction Counseling), Result, and Counseled by. Red arrows point to each of these fields and the 'Save' button at the bottom.

- g. **Mental Health**: Indicate if a mental health screening was performed. Click on the **+** in the upper right corner of the **Mental Health** field (it will appear when the cursor hovers near the date).

The screenshot shows the 'Brontosaurus, Betty' client record interface. The 'Annual Screening' section on the left has a red arrow pointing to the 'Mental Health' field. The 'Insurance' section on the right is also visible.

- h. The **Annual Screening** screen will appear with drop-down menus for the **Date**, **Type** and **Result**. In the **Type** menu, choose **Mental Health**. **Save** your entries

The screenshot shows the 'Annual Screening' dialog box. The 'Date' is set to 11/4/2013, 'Type' is set to Mental Health, and 'Result' is empty. A red arrow points to the 'Save' button.

- i. **Substance Abuse**: Indicate if a substance abuse screening was performed. Click on the **+** in the upper right corner of the **Substance Abuse** field (it will appear when the cursor hovers near the date).

The screenshot shows the 'Brontosaurus, Betty' client information window. The 'Annual Screening' section is expanded, showing a list of screening types: HIV Primary Care, Housing Arrangement, HIV Risk Reduction Counseling, Mental Health, and Substance Abuse. A red arrow points to the 'Substance Abuse' field. The 'Insurance' section is also visible, showing a table with columns for Date, Primary Insurance, and Other Insurance.

- j. The **Annual Screening** screen will appear with drop-down menus for the **Date**, **Type** and **Result**. In the **Type** menu, choose **Substance Abuse**. **Save** your entries.

The screenshot shows the 'Annual Screening' dialog box. It contains three drop-down menus: 'Date' (set to 11/4/2013), 'Type' (set to Substance Abuse), and 'Result' (empty). At the bottom, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

6. If the values for **Insurance**, **Federal Poverty Level**, **HIV Primary Care** or **Housing Arrangement** have not changed from the last assessment, you may update the current assessment with those values by selecting the **Bring Forward** button.

The screenshot shows the 'Brontosaurus, Betty' client record interface. The top navigation bar includes 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Merge Client', and 'Delete Client'. Below this is a secondary navigation bar with 'Find List', 'New Search', and 'Close'. The main content area is divided into several sections. On the left, there is a 'Summary Data as of' dropdown set to '9/20/2012' and a 'Bring Forward' button. Below this are sections for 'Insurance', 'Federal Poverty Level', and 'Annual Screening'. The 'Insurance' section on the right has 'Add', 'Edit', and 'Delete' buttons. A red arrow points to the 'Bring Forward' button.

7. The **Bring Forward Values** screen appears. Place a checkmark in the boxes of the values that you want to bring forward and press **Save**.

The screenshot shows the 'Bring Forward Values' dialog box. At the top, there is an 'Assessment Date' dropdown set to '8/7/2013'. Below this is a list of four items, each with a checkbox and a date in red text. The first item is 'Insurance' with a date of '*9/20/2012'. The second item is 'Federal Poverty Level' with a date of '*9/25/2012'. The third item is 'HIV Primary Care' with a date of '*9/20/2012'. The fourth item is 'Housing Arrangement' with a date of '*10/5/2012'. Each item has a green text label: 'Other' for Insurance, '\$20,000' for Federal Poverty Level, 'Emergency Room' for HIV Primary Care, and 'Stable/Permanent' for Housing Arrangement. At the bottom, there are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

Part 11 – Encounter

A. Entering Clinical Encounter Information

When entering data about an encounter, remember that the information applies only to the specific date of that encounter, whether it is today or a prior visit.

B. Rapid Entry Screens in Encounters

Rapid entry screens allow for quick additions and changes to clinical encounter information entered from any date. The encounter-by-encounter screens allow providers to see current information, as well as some information from the previous encounter. By default, all rapid entry screens show you the entire previous year of data, but you can modify this to any date range.

Rapid entry screens give providers an overview of a client's historical data in each clinical area. Users can readily produce charts and progress reports that allow for quick review of the medical history for any date range selected. Charting options are available in sub-tabs to plot quantitative values that change over time, such as lab results for CD4 count and viral load or other tests and vital signs.

You can add, edit or delete information in any of the rapid entry screens. We recommend that you use rapid entry only for minor additions and corrections to clinical information; for example, a client stops or changes a medication between visits. Using dated clinical encounters to enter information makes it easier for you and others to access that information in the future.

The Rapid Entry screen for each encounter sub-tab is presented here after the sub-tab's instructions.

C. Encounters

1. To begin entry on a new encounter, select the **Encounters** tab. Click on **Create Encounter**.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Manage Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Medications | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Encounter Date: 01/20/2015 | Jeffrey S | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

☒ Only show data for this provider

Vital Signs | Hospital/ER Admissions | Medications | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

Vital Signs

Values are in: ☒ English ☐ Metric

Rapid Entry

	Prior Value:	Date Taken:	Current Value:	Current Value Provider:
Height(inches)				
Weight(lbs)				
Pulse (bpm)				
Temperature(F)				
B.P. Sys/Dia:				

Pregnant? ☐ Last visit ☐ Currently View/Edit History

2. The **Create Encounter** screen will appear. Enter the **Encounter Date** and click on **Create Encounter** on that screen. The date shown will default to today's date.

Create Encounter

Encounter Date: 8/7/2013

Create Encounter Cancel

3. To access a prior encounter, use the drop-down menu in the **Encounter Date** menu to find the previous encounter date.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 01/20/2015 | Jeffrey S. Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Vital Signs

Values are in: English Metric

	Prior Value:	Date Taken:	Current Value:	Current Value Provider:
Height(inches)				
Weight(lbs)				
Pulse (bpm)				
Temperature(F)				
B.P. Sys/Dia:				

Pregnant? ☐ Last visit ☐ Currently View/Edit History

D. Vital Signs

1. **Vital Signs** can be entered in **English** or **Metric** values. Height is entered in inches or centimeters, weight in pounds or kilograms, and temperature in Fahrenheit or Celsius. Pulse and blood pressure are not affected. For each vital sign, CAREWare has set a “normal” range. If the value you enter is outside of that range, you’ll be asked if you want to correct it.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 01/20/2015 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Vital Signs

Values are in: ☒ English ☐ Metric

Rapid Entry

Prior Value:	Date Taken:	Current Value:	Current Value Provider:
Height(inches)			
Weight(lbs)			
Pulse (bpm)			
Temperature(F)			
B.P. Sys/Dia:			

Pregnant? ☐ Last visit ☐ Currently View/Edit History

- a. Below is an example of a **Quality Check** message when a value is outside of the range.

Quality Check

500 is out of the normal range for Pulse. Are you sure you want to use this value?

Yes No

- To use the rapid entry feature, click on the **Rapid Entry** button.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Encounter Date: 01/20/2015 | Jeffrey S | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

☒ Only show data for this provider

Vital Signs | Hospital/ER Admissions | Medications | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

Vital Signs

Values are in: English Metric

Prior Value: Date Taken: Current Value: Current Value Provider:

Height(inches)				
Weight(lbs)				
Pulse (bpm)				
Temperature(F)				
B.P. Sys/Dia				

Pregnant? ☐ Last visit ☐ Currently View/Edit History

- The **Vital Signs Rapid Entry** screen will appear.

Vital Signs Rapid Entry

Client: Brontosaurus, Betty From: 8/7/2012 Through: 8/7/2013 Values are in: English Metric Report Close

☒ Only show this provider

Vital Sign: Date: Result: Save Cancel

Vital Sign:	Date:	Result:	Provider:

Add Edit Delete

List Primary: Secondary: Show All

Chart Primary: Secondary:

4. By default, all vital signs from the last year are shown. Un-checking the **Show All** button will allow you to see only one or two (**Primary** and/or **Secondary**) values from the drop-down menus in the **List**.

The screenshot shows the 'Vital Signs Rapid Entry' window. At the top, there's a header bar with the title. Below it, a form area contains fields for 'Client' (Brontosaurus, Betty), 'From' (8/7/2012), 'Through' (8/7/2013), and 'Values are in' (English/Metric). There are buttons for 'Report', 'Close', and 'View Expanded Chart'. Below this, there's a section for 'Vital Sign', 'Date', and 'Result' with dropdown menus. A table with columns 'Vital Sign', 'Date', 'Result', and 'Provider' is shown. To the right of the table, there's a 'List' section with 'Primary' and 'Secondary' dropdown menus, a 'Show All' checkbox (checked), and a 'Chart' section with 'Primary' and 'Secondary' dropdown menus. Red arrows point to the 'Primary' dropdown in the 'List' section, the 'Secondary' dropdown in the 'List' section, and the 'Show All' checkbox. At the bottom, there are 'Add', 'Edit', and 'Delete' buttons.

5. You can also choose **Primary** and/or **Secondary** values from the drop-down menus from which to run a **Chart**.

This screenshot is identical to the one above, showing the 'Vital Signs Rapid Entry' window. However, the red arrows now point to the 'Primary' dropdown in the 'Chart' section and the 'Secondary' dropdown in the 'Chart' section. The 'Show All' checkbox remains checked.

6. The **View Expanded Chart** button allows you to see a larger version of the chart and choose whether to see it three-dimensionally. The expanded chart is not printable from this window.

The screenshot shows the 'Vital Signs Rapid Entry' window. At the top, there's a header bar with the title. Below it, a form contains fields for 'Client' (Brontosaurus, Betty), 'From' (8/7/2012), 'Through' (8/7/2013), and 'Values are in' (English/Metric). There are 'Report' and 'Close' buttons. A red arrow points to the 'View Expanded Chart' button. Below the form, there's a section for 'Vital Sign' with 'Date' and 'Result' fields, and a 'Save' button. A table with columns 'Vital Sign', 'Date', 'Result', and 'Provider' is shown. To the right of the table are 'List' and 'Chart' sections, each with 'Primary' and 'Secondary' dropdowns and a 'Show All' checkbox. At the bottom are 'Add', 'Edit', and 'Delete' buttons. A large empty box on the right is intended for the chart.

7. The **Report** button allows you to generate a printable report based on the filters you've selected.

This screenshot is identical to the one above, showing the 'Vital Signs Rapid Entry' window. However, a red arrow now points to the 'Report' button instead of the 'View Expanded Chart' button. All other elements, including the form fields, buttons, and layout, remain the same.

- Change the **From** and **Through** dates and the graph will automatically re-plot using the new date range.

Vital Signs Rapid Entry

Client: Brontosaurus, Betty From: 8/7/2012 Through: 8/7/2013 Values are in: English Metric

☒ Only show this provider

Report Close View Expanded Chart

Vital Sign: Date: Result:

Save Cancel

List Primary: Secondary: ☒ Show All

Chart Primary: Secondary:

Add Edit Delete

E. Hospital/ER Admissions

- Information on a client's HIV-related hospital and emergency room (ER) admissions, number of days in hospital and reason for ER visit/diagnosis are entered under the **Hospital/ER Admissions** sub-tab. Historical information entered during encounters will appear on the bottom half of the screen. **Save** your entries.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 11/04/2012 | Jeffrey S. Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Hospital/ER Admissions:

Current

Total number of HIV-related hospital admissions since previous encounter: 2 Total Number of Hospital Days: 5 Total number of HIV-related ER visits since previous Encounter: 1 Reason/Diagnosis: extreme weight loss Save

Encounter ...	Hospital ad...	Hospital da...	ER visits:	Reason/Di...	Provider:
11/4/2012	2	5	1	extreme we...	Jeffrey Stor...

F. Medications

1. Enter the client's complete medication prescription history under the **Medications** sub-tab of **Encounters**.

The screenshot shows the 'Encounters' sub-tab with the 'Medications' sub-tab selected. A red arrow points to the 'Create Encounter' button. The 'Current Medications' section includes fields for 'Date ART 1st Prescribed' and 'Pre-ART Reason', with a 'Rapid Entry' button. Below these is a table with columns: Medication, Abbreviation, Class, Units, Strength, Dose, Frequency, and Daily Dose. At the bottom are buttons for 'Start', 'Stop', 'Correct Data Error', and 'Change Dose'.

2. **Date ART 1st Prescribed** (antiretroviral therapy) defaults to the date of the first HIV medication entered into CAREWare. However, because many clients may have started ART before they came into your agency's care, this field is editable in the **Rapid Entry** screen.

This screenshot is similar to the previous one but includes two red arrows. One arrow points to the 'Date ART 1st Prescribed' field, and the other points to the 'Rapid Entry' button, indicating that this field is editable in that mode.

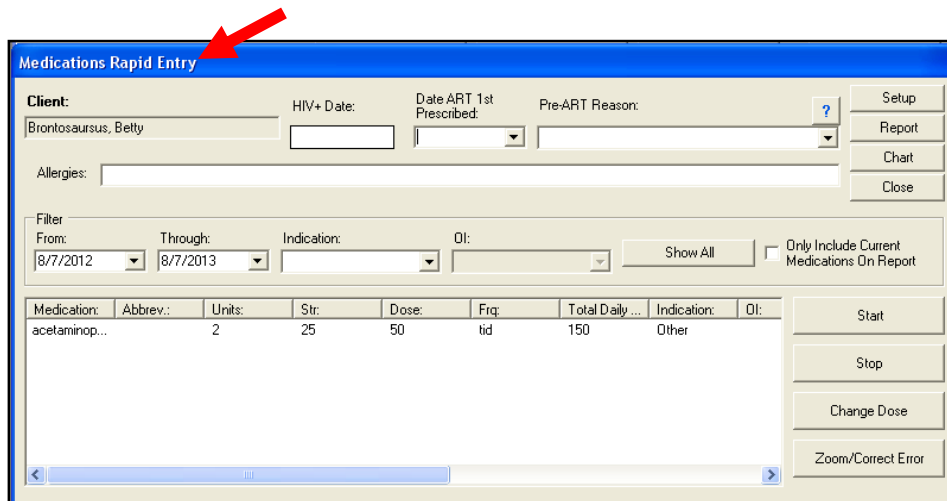
3. **Allergies:** Enter any medication allergies in this field. This information will carry over into future clinical encounters.

The screenshot shows a software interface with a top navigation bar containing tabs: Demographics, Drug Services, Service, Annual Review, Encounters, Referrals, HIV C&T, Pregnancy, Relations, Custom Tab 1, Unique IDs, and Custom. Below the navigation bar, there's a section for 'Encounter Date: 08/07/2013 | Jeffrey S' with buttons for 'Create Encounter', 'Delete Encounter', 'Encounter Report', and 'Sharing Options'. A checkbox labeled 'Only show data for this provider' is checked. Below this is a row of tabs: Vital Signs, Hospital/ER Admissions, Medications, Labs, Screening Labs, Screenings, Immunizations, Diagnoses, and Case Note. The 'Medications' tab is active. In the 'Current Medications' section, there are fields for 'Date ART 1st Prescribed:', 'Pre-ART Reason:', and buttons for 'Setup' and 'Rapid Entry'. A red arrow points to the 'Allergies:' text input field. Below this is a table with columns: Medication, Abbreviation, Class, Units, Strength, Dose, Frequency, and Daily Dose. At the bottom are buttons for 'Start', 'Stop', 'Correct Data Error', and 'Change Dose'.

4. To use the rapid entry feature, click on the **Rapid Entry** button.

This screenshot is identical to the one above, showing the 'Current Medications' section. However, a red arrow points to the 'Rapid Entry' button located next to the 'Setup' button in the 'Current Medications' section.

5. The **Medications Rapid Entry** screen will appear.

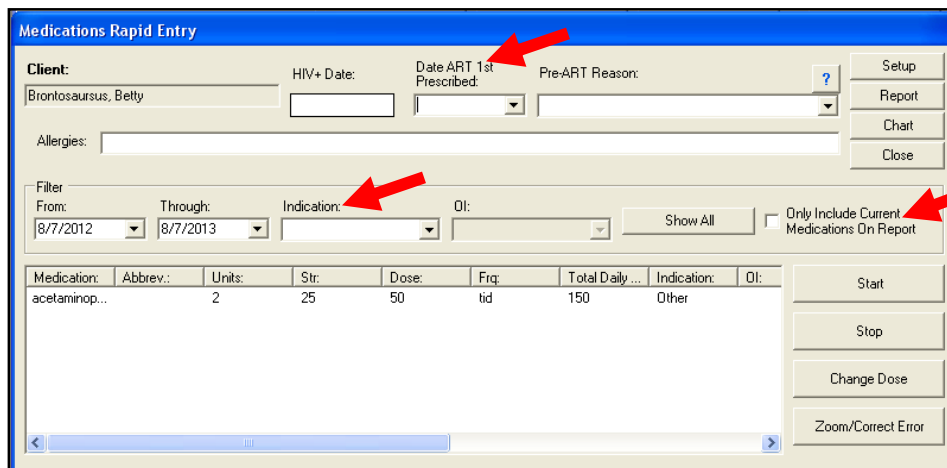


The screenshot shows the 'Medications Rapid Entry' window. A red arrow points to the title bar. The window contains the following fields and controls:

- Client:** Brontosaurus, Betty
- HIV+ Date:** [Empty]
- Date ART 1st Prescribed:** [Dropdown]
- Pre-ART Reason:** [Dropdown]
- Allergies:** [Text area]
- Filter:**
 - From:** 8/7/2012
 - Through:** 8/7/2013
 - Indication:** [Dropdown]
 - Ol:** [Dropdown]
 - Show All:** [Button]
 - Only Include Current Medications On Report:** [Checkbox]
- Table:**

Medication	Abbrev.	Units	Str.	Dose	Frq.	Total Daily ...	Indication	Ol:
acetaminop...		2	25	50	tid	150	Other	
- Buttons:** Setup, Report, Chart, Close, Start, Stop, Change Dose, Zoom/Correct Error.

6. By default, all medications prescribed for the client are shown. You can filter them using the **Indication** drop-down menu to show only medications for **ART**, **OI prophylaxis**, **OI treatment** or **Other**. You can also modify the **Date ART 1st Prescribed** entry if the client began ART treatment prior to becoming your client. Otherwise, CAREWare will populate this field with the earliest ARV start date entered. You can also check **Only Include Current Medications On Report** for medications for which there is no stop date (or a stop date after the date range selected). This will shorten the printout for clients with many non-active medications.



This screenshot is identical to the one above, but with three red arrows highlighting specific filter options:

- One arrow points to the **Indication** dropdown menu in the Filter section.
- Another arrow points to the **Date ART 1st Prescribed** dropdown menu.
- A third arrow points to the **Only Include Current Medications On Report** checkbox.

G. Starting Medications

1. To start medications, press the **Start** button.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: **Is Plaything Wonderfark** Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Current Medications: Date ART 1st Prescribed: 7/1/2012 Pre-ART Reason: Setup Rapid Entry

Allergies: Test

Medication	Abbrevi...	Class	Units	Strength	Dose	Frequ

Start Stop Correct Data Error Change Dose

2. The **Start Medication(s) Page 1** screen will appear.

Start Medication(s) Page 1

1. Enter the start date for the medication(s).
2. Select the regimen you are starting
OR
Click on the medication(s) you want to start.
3. Click Next>>

Start Date: 8/7/2013

Regimen:

Start	Regimen Name

Regimen Setup

Medication(s): Filter:

☐ All Medications
☐ ART Medications
☐ Non-ART Medications

Start	Medication Name
<input type="checkbox"/>	acarbose
<input type="checkbox"/>	acarbose (deprecated)
<input type="checkbox"/>	acebutolol
<input type="checkbox"/>	acebutolol hydrochloride
<input checked="" type="checkbox"/>	acetaminophen
<input type="checkbox"/>	acetaminophen (deprecated)
<input type="checkbox"/>	acetaminophen-aspirin
<input type="checkbox"/>	acetaminophen-butalbital
<input type="checkbox"/>	acetaminophen-caffeine

Cancel Next>>

3. Enter the medication(s). Select the medication(s) by checking the box to the left of the name in the **Start** column of the scroll-down **Medication Name** menu.

Start Medication(s) Page 1

1. Enter the start date for the medication(s).
 2. Select the regimen you are starting
 OR
 Click on the medication(s) you want to start.
 3. Click Next>>

Start Date: 8/7/2013

Regimen:

Start	Regimen Name

Regimen Setup

Medication(s): Filter:

☒ All Medications
☐ ART Medications
☐ Non-ART Medications

Start	Medication Name
<input type="checkbox"/>	acarbose
<input type="checkbox"/>	acarbose (deprecated)
<input type="checkbox"/>	acebutolol
<input type="checkbox"/>	acebutolol hydrochloride
<input checked="" type="checkbox"/>	acetaminophen
<input type="checkbox"/>	acetaminophen (deprecated)
<input type="checkbox"/>	acetaminophen-aspirin
<input type="checkbox"/>	acetaminophen-butalbital
<input type="checkbox"/>	acetaminophen-caffeine

Cancel Next>>

4. You can also search for the medication by typing a string of letters from its name into the **Filter** field. All medications with that string of letters will appear in the **Medication Name** menu.

Start Medication(s) Page 1

1. Enter the start date for the medication(s).
 2. Select the regimen you are starting
 OR
 Click on the medication(s) you want to start.
 3. Click Next>>

Start Date: 8/7/2013

Regimen:

Start	Regimen Name

Regimen Setup

Medication(s): Filter:

☒ All Medications
☐ ART Medications
☐ Non-ART Medications

Start	Medication Name
<input type="checkbox"/>	acarbose
<input type="checkbox"/>	acarbose (deprecated)
<input type="checkbox"/>	acebutolol
<input type="checkbox"/>	acebutolol hydrochloride
<input checked="" type="checkbox"/>	acetaminophen
<input type="checkbox"/>	acetaminophen (deprecated)
<input type="checkbox"/>	acetaminophen-aspirin
<input type="checkbox"/>	acetaminophen-butalbital
<input type="checkbox"/>	acetaminophen-caffeine

Cancel Next>>

- For example, by typing “andela” into the **Filter** field, “cyclandelate,” “cyclandelate (deprecated)” and “methenamine mandelate” will be listed in the **Medication Name** menu. **NOTE:** The **Filter** field will find all medications containing the string of letters that are entered, not just those that begin with that string.

Start Medication(s) Page 1

1. Enter the start date for the medication(s).
 2. Select the regimen you are starting
 OR
 Click on the medication(s) you want to start.
 3. Click Next>

Start Date: 8/7/2013

Regimen:

Start	Regimen Name

Regimen Setup

Medication(s): Filter: andela

Start	Medication Name
<input type="checkbox"/>	cyclandelate
<input type="checkbox"/>	cyclandelate (deprecated)
<input type="checkbox"/>	methenamine mandelate

Cancel Next>>

- To narrow the medications search, choose either the **ART Medication** or **Non-ART Medications** option above the **Filter** field.

Start Medication(s) Page 1

1. Enter the start date for the medication(s).
 2. Select the regimen you are starting
 OR
 Click on the medication(s) you want to start.
 3. Click Next>

Start Date: 8/7/2013

Regimen:

Start	Regimen Name

Regimen Setup

Medication(s): Filter:

☒ All Medications
☐ ART Medications
☐ Non-ART Medications

Start	Medication Name
<input type="checkbox"/>	acarbose
<input type="checkbox"/>	acarbose (deprecated)
<input type="checkbox"/>	acetabulol
<input type="checkbox"/>	acetabulol hydrochloride
<input checked="" type="checkbox"/>	acetaminophen
<input type="checkbox"/>	acetaminophen (deprecated)
<input type="checkbox"/>	acetaminophen-aspirin
<input type="checkbox"/>	acetaminophen-butalbital
<input type="checkbox"/>	acetaminophen-caffeine

Cancel Next>>

7. After selecting all medications, click **Next**.

Start Medication(s) Page 1

1. Enter the start date for the medication(s).
2. Select the regimen you are starting
OR
Click on the medication(s) you want to start.
3. Click Next>>

Start Date: 8/7/2013

Regimen:

Start	Regimen Name

Regimen Setup

Medication(s): Filter:

Start	Medication Name
<input type="checkbox"/>	acarbose
<input type="checkbox"/>	acarbose (deprecated)
<input type="checkbox"/>	acebutolol
<input type="checkbox"/>	acebutolol hydrochloride
<input checked="" type="checkbox"/>	acetaminophen
<input type="checkbox"/>	acetaminophen (deprecated)
<input type="checkbox"/>	acetaminophen-aspirin
<input type="checkbox"/>	acetaminophen-butalbital
<input type="checkbox"/>	acetaminophen-caffeine

Cancel Next>>

8. The **Start Medication** screen will appear.

Start Medication

4. Enter the strength, frequency and other related information for each medication.
5. Click Finish.

Medication: Units: Form: Strength: Frequency: Dose: Indication: DI: Comment: Instructions:

acetaminophen

<<Back Finish

9. Add the **Units**, **Form**, **Strength** and **Frequency**.

Start Medication

4. Enter the strength, frequency and other related information for each medication.
5. Click Finish.

Medication: Units: Form: Strength: Frequency: Dose: Indication: DI: Comment: Instructions:

acetaminophen

<<Back Finish

10. From the **Indication** drop-down menu, select **ART** (antiretrovirals), **OI** (opportunistic infection) **prophylaxis**, **OI treatment** or **Other** (for other medications you may enter not related to HIV care).

The screenshot shows the 'Start Medication' form with a blue header. Below the header, there are instructions: '4. Enter the strength, frequency and other related information for each medication.' and '5. Click Finish.' The form has several input fields: 'Medication:' (with a dropdown menu showing 'acetaminophen'), 'Units:', 'Form:', 'Strength:', 'Frequency:', 'Dose:', 'Indication:', 'OI:', 'Comment:', and 'Instructions:'. A red arrow points to the 'Indication:' dropdown menu. To the right of the main form, a separate window shows the 'Indication:' dropdown menu with a list of options: 'ART', 'OI Prophylaxis', 'OI Treatment', and 'Other'. A red arrow points to the 'Indication:' label in this window.

11. If the indication is **OI Prophylaxis** or **OI Treatment**, the **OI** drop-down menu will activate. Select the relevant opportunistic infection for which the medication(s) is being prescribed.

The screenshot shows the 'Start Medication' form with a blue header. Below the header, there are instructions: '4. Enter the strength, frequency and other related information for each medication.' and '5. Click Finish.' The form has several input fields: 'Medication:' (with a dropdown menu showing 'acetaminophen'), 'Units:', 'Form:', 'Strength:', 'Frequency:', 'Dose:', 'Indication:', 'OI:', 'Comment:', and 'Instructions:'. A red arrow points to the 'OI:' dropdown menu. To the right of the main form, a separate window shows the 'OI:' dropdown menu with a list of options: 'Pneumocystis carinii pneumonia (PCP)', 'M. avium complex (Mac)', 'M. tuberculosis (Mtb)', 'Candida', 'Cytomegalovirus (CMV)', 'Toxoplasma gondii', 'Varicella zoster virus (VZV)', and 'Other'. A red arrow points to the 'OI:' label in this window.

12. Click **Finish** to save.

Start Medication

4. Enter the strength, frequency and other related information for each medication.

5. Click Finish.

Medication: Units: Form: Strength: Frequency: Dose: Indication: DI: Comment: Instructions:

acetaminophen

<<Back Finish

H. Stopping Medications

1. To stop a medication, return to the **Medications** tab.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 5/11/2012 Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Current Medications:

Date ART 1st Prescribed: 7/1/2012 Pre-ART Reason: ? Setup Rapid Entry

Allergies: Test

Medication	Abbrevi...	Class	Units	Strength	Dose	Freq
------------	------------	-------	-------	----------	------	------

Start Stop Correct Data Error Change Dose

2. Click on **Stop**.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S. | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

☒ Only show data for this provider

Vital Signs | Hospital/ER Admissions | Medications | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

Current Medications: 7/1/2012 Date ART 1st Prescribed: Pre-ART Reason: ? Setup Rapid Entry

Allergies: Test

Medication	Abbrev...	Class	Units	Strength	Dose	Frequ
acetaminophen (Capsules)			2	25	50	tid

Start Stop Correct Data Error Change Dose

3. The **Stop Medication** screen will appear. Place a checkmark in the box next to the medication you wish to stop.

Stop Medication

1. Enter the last date that client took the medication(s) and the reason for discontinuing the medication(s):

Stop Date: 8/7/2013 Reason for Discontinuing:

2. Check the medication(s) that are being stopped:

Stop	Medication Name
<input type="checkbox"/>	acetaminophen (Capsules)
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Close Stop Selected Med(s) Go to Start New Med(s) Form

4. Select the **Stop Date** and the **Reason for Discontinuing** from the drop-down menus, then press the **Stop Selected Med** button.

Stop Medication

1. Enter the last date that client took the medication(s) and the reason for discontinuing the medication(s):

Stop Date: 8/7/2013 Reason for Discontinuing: Therapy completed

2. Check the medication(s) that are being stopped:

Stop	Medication Name
<input checked="" type="checkbox"/>	acetaminophen (Capsules)
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

Close Stop Selected Med Go to Start New Med(s) Form

I. Correcting a Medication Data Error

1. To correct a medication data entry error, return to the **Encounters** tab, **Medications** sub-tab. Select the medication you wish to correct and click the **Correct Data Error** button.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client **Encounters** Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Current Medications:

Date ART 1st Prescribed: 7/1/2012 Pre-ART Reason: ? Setup Rapid Entry

Allergies: Test

Medication	Abbrevi...	Class	Units	Strength	Dose	Frequ
acetaminophen (Capsules)			2	25	50	tid

Start Stop **Correct Data Error** Change Dose

2. The **Medications Rapid Entry – Zoom/Correct Error** screen will appear. Changes can be made to any of the fields on this screen.

Medications Rapid Entry - Zoom/Correct Error

Client:
Betty Brontosaurus

Medication:
acetaminophen

Form:
Capsules

Units: 2 **Strength:** 25 **Dose:** 50

Frequency: tid **Total Daily Dose:** 150

Indication: Other **OI:**

Start Date: 8/7/2013 **Stop Date:**

Reason For Discontinuation:

Comment:

Instructions:

Buttons: Apply, Cancel, Delete

3. The **Medications Rapid Entry – Zoom/Correct Error** screen can also be accessed from the **Medications Rapid Entry** screen by clicking on the **Zoom/Correct Error** button.

Medications Rapid Entry

Client: Brontosaurus, Betty **HIV+ Date:** **Date ART 1st Prescribed:** **Pre-ART Reason:** ? **Buttons:** Setup, Report, Chart, Close

Allergies:

Filter: From: 8/7/2012 Through: 8/7/2013 Indication: OI: Show All Only Include Current Medications On Report

Medication	Abbrev.	Units	Str.	Dose	Freq.	Total Daily ...	Indication	OI
acetaminop...		2	25	50	tid	150	Other	

Buttons: Start, Stop, Change Dose, Zoom/Correct Error

- Click **Apply** to save changes.

Medications Rapid Entry - Zoom/Correct Error

Client:
Betty Brontosaurus

Medication:
acetaminophen

Form:
Capsules

Units: 2 **Strength:** 25 **Dose:** 50

Frequency: tid **Total Daily Dose:** 150

Indication: Other **OI:**

Start Date: 8/7/2013 **Stop Date:**

Reason For Discontinuation:

Comment:

Instructions:

Apply **Cancel** **Delete**

J. Change Dose

The **Change Dose** button allows you to change a medication's dose without having to stop the medication and restart it at a different dose. Information on the prior dose will be retained. The change date defaults to the date of the current encounter.

1. The **Change Dose** button is on the **Encounters** tab, **Medications** sub-tab. Select the medication for which you wish to change the dose and click on **Change Dose**.

Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client **Encounters** | Merge Client | Delete Client | Find List | New Search | Close

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S. | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

☒ Only show data for this provider

Vital Signs | Hospital/ER Admissions | **Medications** | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

Current Medications:

Date ART Test Prescribed: 7/1/2012 | Pre-ART Reason: | Setup | Rapid Entry

Allergies: Test

Medication	Abbrev.	Class	Units	Strength	Dose	Frequ.
acetaminophen (Capsules)			2	25	50	tid

Start | Stop | Correct Data Error | **Change Dose**

2. The **Medications Rapid Entry - Change Dose** screen will appear. Changes can be made to any of the fields on this screen. Click **Apply** to save changes.

Medications Rapid Entry - Change Dose

Client: Brontosaurus, Betty | Change Date: 8/7/2013

Medication: acetaminophen (Capsules)

Current:

Units	Strength	Dose	Frequency	Total Dose
2	25	50	tid	150

Change To:

Units	Strength	Dose	Frequency	Total Dose

Apply | Cancel

- The **Medications Rapid Entry – Change Dose** screen can also be accessed from the **Medications Rapid Entry** screen by clicking on the **Change Dose** button.

The screenshot shows the 'Medications Rapid Entry' window. At the top, there are fields for 'Client:' (Brontosaurus, Betty), 'HIV+ Date:', 'Date ART 1st Prescribed:', and 'Pre-ART Reason:'. Below these are 'Allergies:' and a 'Filter' section with 'From:' (8/7/2012), 'Through:' (8/7/2013), 'Indication:', and 'OI:'. A 'Show All' button and a checkbox 'Only Include Current Medications On Report' are also present. A table lists medications, with 'acetaminop...' shown. On the right, there are buttons for 'Setup', 'Report', 'Chart', 'Close', 'Start', 'Stop', 'Change Dose' (highlighted with a red arrow), and 'Zoom/Correct Error'.

K. Entering Laboratory Results

- To enter a lab, go to the **Encounters** tab, **Labs** sub-tab.

The screenshot shows the 'Encounters' tab with the 'Labs' sub-tab selected. The 'Encounter Date:' is 10/09/2014 for 'Jeffrey S'. There are buttons for 'Create Encounter', 'Delete Encounter', 'Encounter Report', and 'Sharing Options'. A checkbox 'Only show data for this provider' is checked. Below the tabs, there are 'Vital Signs', 'Hospital/ER Admissions', 'Medications', 'Labs' (highlighted with a red arrow), 'Screening Labs', 'Screenings', 'Immunizations', 'Diagnoses', and 'Case Note'. The 'Labs' section has 'Add/Edit' and 'Rapid Entry' buttons. A 'Current Test' dropdown is set to 'CD4 Count (cells/mm³)' with a 'Result' of '250'. Below this is a list of tests including 'Albumin (g/dL)', 'ALT (IU/L)', 'AST (IU/L)', 'CD4 Count (cells/mm³)', 'CD4 Percent', 'Creatinine (mg/dL)', 'Glucose (mg/dL)', 'HDL (mg/dL)', 'Hemoglobin (g/dL)', 'LDL (mg/dL)', 'Platelets (cells/mm³)', 'Total Cholesterol (mg/dL)', 'Triglycerides (mg/dL)', 'Viral Load (Copies/mL)', and 'WBC (x 10³/mm³)'. Buttons for 'Save' and 'Delete' are also present.

2. Type the first few letters of the name of the test in the **Current Test** drop-down menu or select a lab from the **Test** menu.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Labs Rapid Entry Setup

Add/Edit

Current Test: CD4 Count (cells/mm³) Result: 250 Save Delete

Test: Date of Pri... Prior Result: Current Re... Provider: Comment:

- Albumin (g/dL)
- ALT (IU/L)
- AST (IU/L)
- CD4 Count (cells/mm³)
- CD4 Percent
- Creatinine (mg/dL)
- Glucose (mg/dL)
- HDL (mg/dL)
- Hemoglobin (g/dL)
- LDL (mg/dL)
- Platelets (cells/mm³)
- Total Cholesterol (mg/dL)
- Triglycerides (mg/dL)
- Viral Load (Copies/mL)
- WBC (x 10³/mm³)

Enter the value in the **Results** field. **NOTE:** The drop-down menu to the left of the **Results** field allows for values of = (equal to), < (less than), > (greater than), >= (greater than or equal to) or <= (less than or equal to). **Save** your entries.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Labs Rapid Entry Setup

Add/Edit

Current Test: CD4 Count (cells/mm³) Result: 250 Save Delete

Test: Date of Pri... Prior Result: Current Re... Provider: Comment:

- Albumin (g/dL)
- ALT (IU/L)
- AST (IU/L)
- CD4 Count (cells/mm³)
- CD4 Percent
- Creatinine (mg/dL)
- Glucose (mg/dL)
- HDL (mg/dL)
- Hemoglobin (g/dL)
- LDL (mg/dL)
- Platelets (cells/mm³)
- Total Cholesterol (mg/dL)
- Triglycerides (mg/dL)
- Viral Load (Copies/mL)
- WBC (x 10³/mm³)

4. To use the rapid entry feature, click on the **Rapid Entry** button.

The screenshot shows the 'Brontosaurus, Betty' client record interface. The 'Labs' tab is selected, and the 'Rapid Entry' button is highlighted with a red arrow. The interface includes a top navigation bar with options like 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Merge Client', and 'Delete Client'. Below this, there are tabs for 'Demographics', 'Drug Services', 'Service', 'Annual Review', 'Encounters', 'Referrals', 'HIV C&T', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', and 'Custom Tab 3'. The 'Encounter Date' is set to '10/09/2014 | Jeffrey S'. The 'Labs' section shows a list of tests, including 'CD4 Count (cells/mm³)', 'CD4 Percent', 'Creatinine (mg/dL)', 'Glucose (mg/dL)', 'HDL (mg/dL)', 'Hemoglobin (g/dL)', 'LDL (mg/dL)', 'Platelets (cells/mm³)', 'Total Cholesterol (mg/dL)', 'Triglycerides (mg/dL)', 'Viral Load (Copies/mL)', and 'WBC (x 10³/mm³)'. The 'Rapid Entry' button is located next to the 'Setup' button.

5. The **Labs Rapid Entry** screen will appear.

The screenshot shows the 'Labs Rapid Entry' screen. The 'Client' is 'Brontosaurus, Betty'. The 'From' date is '8/7/2012' and the 'Through' date is '8/7/2013'. The 'Primary Filter' and 'Secondary Filter' are both empty. The 'Show all Labs (no chart)' checkbox is checked. The 'Test' dropdown is set to 'CD4 Count (cells/mm³)'. The 'Date' is '8/7/2013' and the 'Result' is '250'. The 'Provider' is 'Jeffrey Stor...'. The 'Add', 'Edit', 'Delete', 'Image', and 'HL7Source' buttons are at the bottom. A red arrow points to the 'Labs Rapid Entry' title bar.

6. **Show all Labs (no chart)** is selected by default. You can apply **Primary** and **Secondary Filters** (for instance, CD4 and viral load) to view only one or two labs, view charts and run reports by selecting the filter(s) and un-checking **Show all Labs (no chart)**.

The screenshot shows the 'Labs Rapid Entry' window. At the top, there are fields for 'Client' (Brontosaurus, Betty), 'From' (8/7/2012), and 'Through' (8/7/2013). There are also 'Primary Filter' and 'Secondary Filter' dropdown menus. A checkbox labeled 'Show all Labs (no chart)' is checked. Below these are fields for 'Test', 'Date', 'Result', and 'Comment'. At the bottom, there is a table with columns 'Test', 'Date', 'Result', and 'Provider'. The table contains one row: 'CD4 Count (cells/mm³)', '8/7/2013', '250', and 'Jeffrey Stor...'. There are also buttons for 'Add', 'Edit', 'Delete', 'Image', and 'HL7Source'.

L. Screening Labs

Screening labs allow you to track tests that have a qualitative result as positive, negative or presumptive. For some tests, such as a syphilis RPR, you can also record the titer.

Entering Screening Labs

1. To enter a screening lab, go to the **Encounters** tab, **Screening Labs** sub-tab.

The screenshot shows the 'Screening Labs' sub-tab in the 'Encounters' section. At the top, there are tabs for 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Delete Client', 'Find List', 'New Search', and 'Close'. Below these are tabs for 'Demographics', 'Drug Services', 'Service', 'Annual Review', 'Encounters', 'Referrals', 'HIV C&T', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', and 'Custom Tab 3'. The 'Encounters' tab is selected, and the 'Screening Labs' sub-tab is active. There are buttons for 'Create Encounter', 'Delete Encounter', 'Encounter Report', and 'Sharing Options'. Below these are fields for 'Encounter Date' (10/09/2014) and 'Jeffrey S'. There is a checkbox labeled 'Only show data for this provider'. Below this are tabs for 'Vital Signs', 'Hospital/ER Admissions', 'Medications', 'Labs', 'Screening Labs', 'Screenings', 'Immunizations', 'Diagnoses', and 'Case Note'. The 'Screening Labs' tab is selected. There is a 'Rapid Entry' button and a 'Setup' button. Below these are fields for 'Current Test' (Chlamydia), 'Result' (Negative), 'Titer' (1:), and 'Treatment' (NA). There are 'Save' and 'Delete' buttons. Below these is a table with columns 'Test', 'Date of Pri...', 'Prior Result', 'Current Re...', 'Titer', 'Treatment', and 'Provider'. The table contains several rows of tests: Chlamydia, Cytomegalovirus (CMV), Epstein Barr Virus (EBV), Genital Herpes, Gonorrhea, HBeAb, HBeAg, HBV(DNA), HCV(RNA), Hepatitis A Ab-IgM, Hepatitis A Ab-Total, Hepatitis B core antibody IgM (HBeAb), and Hepatitis B core antibody, total.

2. Select the screening lab you wish to enter by either typing the first few letters of the test name in the **Current Test** drop-down menu or by selecting the test from the list in the **Test** menu.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Screening Labs Rapid Entry Setup

Add/Edit

Current Test: Chlamydia Result: Negative Titer: 1: Treatment: NA Save Delete

Test: Chlamydia Date of Pri... Prior Result: Current Re... Titer: Treatment: Provider: C

Chlamydia
Cytomegalovirus (CMV)
Epstein Barr Virus (EBV)
Genital Herpes
Gonorrhea
HBeAb
HBeAg
HBV(DNA)
HCV(RNA)
Hepatitis A Ab-IgM
Hepatitis A Ab-Total
Hepatitis B core antibody IgM (HBeAb)
Hepatitis B core antibody, total

3. Enter relevant data for the test in the **Result**, **Titer** and **Treatment** fields. **Save** entries.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Screening Labs Rapid Entry Setup

Add/Edit

Current Test: Chlamydia Result: Negative Titer: 1: Treatment: NA Save Delete

Test: Chlamydia Date of Pri... Prior Result: Current Re... Titer: Treatment: Provider: C

Chlamydia
Cytomegalovirus (CMV)
Epstein Barr Virus (EBV)
Genital Herpes
Gonorrhea
HBeAb
HBeAg
HBV(DNA)
HCV(RNA)
Hepatitis A Ab-IgM
Hepatitis A Ab-Total
Hepatitis B core antibody IgM (HBeAb)
Hepatitis B core antibody, total

4. To use the rapid entry feature, click on the **Rapid Entry** button.

The screenshot shows a medical software interface for a client named 'Brontosaurus, Betty'. The 'Screening Labs' tab is active. A red arrow points to the 'Rapid Entry' button. The interface includes a menu bar with options like 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Merge Client', 'Delete Client', 'Find List', 'New Search', and 'Close'. Below the menu bar, there are tabs for 'Demographics', 'Drug Services', 'Service', 'Annual Review', 'Encounters', 'Referrals', 'HIV C&T', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', and 'Custom Tab 3'. The 'Encounters' tab is selected, showing a list of encounters. The 'Screening Labs' tab is also visible, showing a list of tests and a 'Rapid Entry' button. The 'Rapid Entry' button is highlighted with a red arrow.

5. The **Screening Labs Rapid Entry** screen will appear.

The screenshot shows the 'Screening Labs Rapid Entry' dialog box. A red arrow points to the title bar. The dialog box contains fields for 'Client' (Brontosaurus, Betty), 'From' (11/26/2012), 'Through' (11/26/2013), 'Primary Filter', 'Secondary Filter', 'Show all Tests' (checked), 'Test', 'Date', 'Result', 'Titer', 'Treatment', 'Comment', 'Save', 'Cancel', 'Add', 'Edit', 'Delete', 'Image', and 'HL7Source'. The 'Test' field is set to 'Chlamydia', 'Date' is '8/7/2013', 'Result' is 'Negative', 'Titer' is 'NA', and 'Treatment' is 'Jeffrey Stor...'. The 'Comment' field is empty. The 'Save' button is highlighted.

6. **Show all Tests** is selected by default. You can apply **Primary** and **Secondary Filters** to view only one or two screening labs and run reports by selecting the filter(s) and un-checking **Show all Tests**.

Screening Labs Rapid Entry

Client: Brontosaurus, Betty

From: 11/26/2012 Through: 11/26/2013

Primary Filter: [Dropdown] Secondary Filter: [Dropdown]

☒ Show all Tests

Buttons: Setup, Report, Close

Test: [Dropdown]

Date: [Dropdown] Result: [Dropdown] Titer: 1: [Dropdown] Treatment: [Dropdown]

Comment: [Text Area]

Buttons: Save, Cancel

Test	Date	Result	Titer	Treatment	Provider	Comment	Data Source	Test Status
Chlamydia	8/7/2013	Negative		NA	Jeffrey Stor...	No		

Buttons: Add, Edit, Delete, Image, HL7Source

Entering Annual Screenings

Screenings are tests typically performed annually, such as a Pap smear or a TB skin test (PPD). **NOTE:** Pap smear and pelvic exam options will not appear for male clients.

1. To enter a screening lab, go to the **Encounters** tab, **Screenings** sub-tab.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters **Screenings** HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S [Dropdown] Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs **Screenings** Immunizations Diagnoses Case Note

Screenings Rapid Entry Setup

Add/Edit

Current Test: Pap Smear Current Result: Normal Current Action: [Dropdown] Current Score: [Dropdown] Save Delete

Test	Date of Pri...	Prior Result	Prior Action	Prior Score	Current Re...	Curren
Colposcopy						
Genotype						
History of sexual activity (adolescent)						
Hysterectomy (non-dysplasia/non-malignant indic.)						
Pap Smear						
Pelvic exam						
Pregnancy Status						
Smoking Status						
TB Chest Radiograph						
TST						

2. Select the screening you wish to enter by either typing the first few letters of the test name in the **Current Test** drop-down menu or by selecting the test from the list in the **Test** menu.

The screenshot shows the 'Brontosaurus, Betty' software interface. The 'Screenings' section is active, displaying a list of tests. A red arrow points to the 'Test' list, which includes: Colposcopy, Genotype, History of sexual activity (adolescent), Hysterectomy (non-dysplasia/non-malignant indic.), Pap Smear, Pelvic exam, Pregnancy Status, Smoking Status, TB Chest Radiograph, and TST. The 'Current Test' dropdown is set to 'Pap Smear', and the 'Current Result' dropdown is set to 'Normal'. The 'Current Action' and 'Current Score' fields are empty. The 'Save' and 'Delete' buttons are visible.

3. Enter relevant data for the test in the **Current Result**, **Current Action** and **Current Score** fields. **Save** your entries.

The screenshot shows the 'Brontosaurus, Betty' software interface. The 'Screenings' section is active, displaying a list of tests. Red arrows point to the 'Current Result', 'Current Action', and 'Current Score' fields. The 'Current Test' dropdown is set to 'Pap Smear', and the 'Current Result' dropdown is set to 'Normal'. The 'Current Action' and 'Current Score' fields are empty. The 'Save' and 'Delete' buttons are visible.

4. To use the rapid entry feature, click on the **Rapid Entry** button.

The screenshot shows the 'Brontosaurus, Betty' client record. The 'Screenings' tab is selected, and the 'Rapid Entry' button is highlighted with a red arrow. The 'Add/Edit' section shows 'Current Test: Pap Smear', 'Current Result: Normal', 'Current Action: [blank]', and 'Current Score: [blank]'. Below this is a list of tests: Colposcopy, Genotype, History of sexual activity (adolescent), Hysterectomy (non-dysplasia/non-malignant indic.), Pap Smear, Pelvic exam, Pregnancy Status, Smoking Status, TB Chest Radiograph, and TST. The 'Encounter Date' is 10/09/2014, and the provider is Jeffrey S.

5. The **Screenings Rapid Entry** screen will appear.

The screenshot shows the 'Screenings Rapid Entry' screen. The title bar is highlighted with a red arrow. The screen includes fields for 'Client: Brontosaurus, Betty', 'From: 11/26/2012', 'Through: 11/26/2013', 'Primary Filter: [blank]', 'Secondary Filter: [blank]', and 'Show all Tests' (checked). Below these are fields for 'Test: [blank]', 'Date: [blank]', 'Result: [blank]', 'Action: [blank]', 'Score: [blank]', and 'Comment: [blank]'. At the bottom, there is a table with columns: Test, Date, Result, Action, Score, Provider, Comment, Data Source, and Test Status. The table contains one row: Pap Smear, 8/7/2013, Normal, Jeffrey Stor..., No. At the bottom of the screen are buttons: Add, Edit, Delete, Image, and HL7Source.

6. **Show all Tests** is selected by default. You can apply **Primary** and **Secondary Filters** to view only one or two screenings and run reports by selecting the filter(s) and un-checking **Show all Tests**.

Screenings Rapid Entry

Client: Brontosaurus, Betty

From: 11/26/2012 Through: 11/26/2013

Primary Filter: Secondary Filter:

☒ Show all Tests

Test: Date: Result: Action: Score: Comment: Save Cancel

Test	Date	Result	Action	Score	Provider	Comment	Data Source	Test Status
Pap Smear	8/7/2013	Normal			Jeffrey Stor...	No		

Add Edit Delete Image HL7Source

M. Entering Immunizations

1. To enter an immunization, go to the **Encounters** tab, **Immunizations** sub-tab.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Rep Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Immunizations Rapid Entry Setup

Add/Edit

Vaccine: Pneumovax (PPSV23) Received: Yes Immunity: Immune Save Delete

Vaccine	Prior	Prior Date	Received	Immunity
Hep A/Hep B (Twintx)(1)				
Hep A/Hep B (Twintx)(2)				
Hep A/Hep B (Twintx)(3)				
Hepatitis A (1)				
Hepatitis A (2)				
Hepatitis B (1)				
Hepatitis B (2)				
Hepatitis B (3)				
Influenza				
MMR				
Pneumovax (PPSV23)				
Prenvax13				
Tetanus Toxoid				
Varicella (Chicken pox)				

2. Select the immunization you wish to enter by either typing the first few letters of the vaccine name in the **Vaccine** drop-down menu or by selecting the test from the list in the **Vaccine** menu.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Immunizations Rapid Entry Setup

Add/Edit

Vaccine: Pneumovax (PPSV23) Received: Yes Immunity: Immune Save Delete

Vaccine:	Prior:	Prior Date:	Received:	Immunity:
Hep A/Hep B (Twintx)(1)				
Hep A/Hep B (Twintx)(2)				
Hep A/Hep B (Twintx)(3)				
Hepatitis A (1)				
Hepatitis A (2)				
Hepatitis B (1)				
Hepatitis B (2)				
Hepatitis B (3)				
Influenza				
MMR				
Pneumovax (PPSV23)				
Prenvac13				
Tetanus Toxoid				
Varicella (Chicken pox)				

3. Select the appropriate value from **Received** and **Immunity** menus. **Save** your entries.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Immunizations Rapid Entry Setup

Add/Edit

Vaccine: Pneumovax (PPSV23) Received: Yes Immunity: Immune Save Delete

Vaccine:	Prior:	Prior Date:	Received:	Immunity:
Hep A/Hep B (Twintx)(1)				
Hep A/Hep B (Twintx)(2)				
Hep A/Hep B (Twintx)(3)				
Hepatitis A (1)				
Hepatitis A (2)				
Hepatitis B (1)				
Hepatitis B (2)				
Hepatitis B (3)				
Influenza				
MMR				
Pneumovax (PPSV23)				
Prenvac13				
Tetanus Toxoid				
Varicella (Chicken pox)				

4. To use the rapid entry feature, click on the **Rapid Entry** button.

The screenshot shows the 'Brontosaurus, Betty' client record. The 'Immunizations' tab is selected, and the 'Rapid Entry' button is highlighted with a red arrow. The 'Add/Edit' section shows 'Pneumovax (PPSV23)' as the vaccine, 'Yes' as received, and 'Immune' as the immunity status. Below this is a list of other vaccines: Hep A/Hep B (Twintx)(1), Hep A/Hep B (Twintx)(2), Hep A/Hep B (Twintx)(3), Hepatitis A (1), Hepatitis A (2), Hepatitis B (1), Hepatitis B (2), Hepatitis B (3), Influenza, MMR, Pneumovax (PPSV23), Prevnar13, Tetanus Toxoid, and Varicella (Chicken pox).

5. The **Immunizations Rapid Entry** screen will appear.

The screenshot shows the 'Immunizations Rapid Entry' screen. The title bar is highlighted with a red arrow. The screen displays the client name 'Brontosaurus, Betty', the date range 'From: 11/26/2012 Through: 11/26/2013', and the 'Show All Immunizations' checkbox. The 'Vaccine' field is empty. The 'Date', 'Received', and 'Immunity' fields are also empty. The 'Save' and 'Cancel' buttons are visible. Below the form is a table with the following data:

Vaccine	Date	Received	Immunity	Provider
Pneumovax ...	8/7/2013	Yes	Immune	Jeffrey Stor...

At the bottom of the screen are the 'Add', 'Edit', and 'Delete' buttons.

6. **Show all Immunizations** is selected by default. You can apply **Primary** and **Secondary Filters** to view only one or two immunizations and reports by selecting the filter(s) and un-checking **Show all Immunizations**.

Immunizations Rapid Entry

Client: Brontosaurus, Betty

From: 11/26/2012 Through: 11/26/2013

Primary Filter Secondary Filter

☒ Show All Immunizations

Report Close

Vaccine:

Date: Received: Immunity:

Save Cancel

Vaccine:	Date:	Received:	Immunity:	Provider:
Pneumovax ...	8/7/2013	Yes	Immune	Jeffrey Stor...

Add Edit Delete

N. Entering Diagnoses

1. To enter a diagnosis, go to the **Encounters** tab, **Diagnoses** sub-tab.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Re Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Encounter Date: 10/09/2014 | Jeffrey S Create Encounter Delete Encounter Encounter Report Sharing Options

☒ Only show data for this provider

Vital Signs Hospital/ER Admissions Medications Labs Screening Labs Screenings Immunizations Diagnoses Case Note

Diagnoses Rapid Entry Setup

Add/Edit

Condition: (I33.0) (Acanthias) Scabies Diagnosis: Definitive Comments: Save Delete

Condition: Prior Diagn... Prior Diagn... Prior Comm... Current Dia... Comm

(003.1) (Other salmonella infections) Salmonella septicemia
 (007.0) (Other protozoal intestinal diseases) Balantidiasis
 (007.1) (Other protozoal intestinal diseases) Giardiasis
 (007.4) (Other protozoal intestinal diseases) Cryptosporidiosis
 (009.3) (Ill-defined intestinal infections) Diarrhea of presumed infectious origin
 (011) Pulmonary tuberculosis
 (012) Other respiratory tuberculosis
 (013) Tuberculosis of meninges and central nervous system
 (014) Tuberculosis of intestines, peritoneum, and mesenteric glands
 (015) Tuberculosis of bones and joints
 (016) Tuberculosis of genitourinary system
 (017) Tuberculosis of other organs

2. Select the diagnosis you wish to enter by either typing an open parenthesis “(” and the first few numbers of the ICD-10 code in the **Condition** drop-down menu or by selecting the diagnosis from the list in the **Condition** scroll-down menu. ICD-10 codes are used to report medical diagnoses and inpatient procedures

The screenshot shows the 'Brontosaurus, Betty' software interface. The 'Diagnoses' section is active, displaying a list of ICD-10 conditions. A red arrow points to the 'Condition' drop-down menu, which currently shows '(133.0) (Acanthosis) Scabies'. Another red arrow points to the 'Diagnosis' drop-down menu, which currently shows 'Definitive'. The 'Add/Edit' form includes fields for 'Condition', 'Diagnosis', and 'Comments', along with 'Save' and 'Delete' buttons. Below the form is a scrollable list of conditions, including (003.1) (Other salmonella infections) Salmonella septicemia, (007.0) (Other protozoal intestinal diseases) Balantidiasis, (007.1) (Other protozoal intestinal diseases) Giardiasis, (007.4) (Other protozoal intestinal diseases) Cryptosporidiosis, (009.3) (Ill-defined intestinal infections) Diarrhea of presumed infectious origin, (011) Pulmonary tuberculosis, (012) Other respiratory tuberculosis, (013) Tuberculosis of meninges and central nervous system, (014) Tuberculosis of intestines, peritoneum, and mesenteric glands, (015) Tuberculosis of bones and joints, (016) Tuberculosis of genitourinary system, and (017) Tuberculosis of other organs.

3. From the **Diagnosis** drop-down menu, select whether the condition is **Definitive**, **Presumptive** or **Unknown**.

This screenshot is similar to the one above, showing the 'Brontosaurus, Betty' software interface. The 'Diagnoses' section is active, and the 'Condition' drop-down menu still shows '(133.0) (Acanthosis) Scabies'. A red arrow points to the 'Diagnosis' drop-down menu, which now shows 'Definitive'. The 'Add/Edit' form and the list of conditions below it are the same as in the previous screenshot.

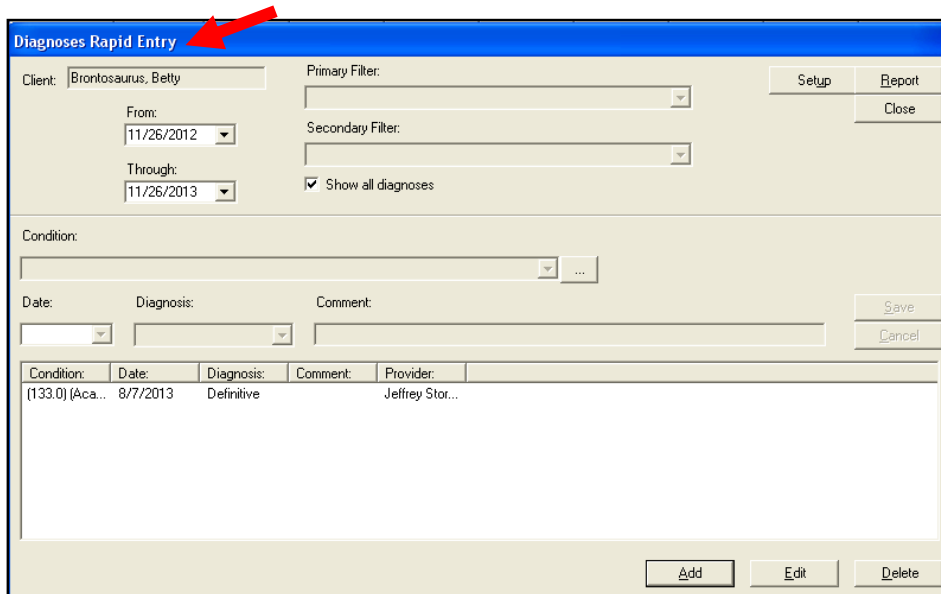
4. Enter any **Comments**. **Save** your entries.

The screenshot shows the 'Brontosaurus, Betty' application window. The 'Diagnoses' tab is selected. In the 'Add/Edit' section, the 'Condition' dropdown is set to '(133.0) (Acanthosis) Scabies' and the 'Diagnosis' dropdown is set to 'Definitive'. The 'Comments' field is empty. A red arrow points to the 'Comments' field. The 'Save' button is visible. Below the 'Add/Edit' section is a list of conditions with checkboxes, including '(003.1) (Other salmonella infections) Salmonella septicemia', '(007.0) (Other protozoal intestinal diseases) Balantidiasis', '(007.1) (Other protozoal intestinal diseases) Giardiasis', '(007.4) (Other protozoal intestinal diseases) Cryptosporidiosis', '(009.3) (Ill-defined intestinal infections) Diarrhea of presumed infectious origin', '(011) Pulmonary tuberculosis', '(012) Other respiratory tuberculosis', '(013) Tuberculosis of meninges and central nervous system', '(014) Tuberculosis of intestines, peritoneum, and mesenteric glands', '(015) Tuberculosis of bones and joints', '(016) Tuberculosis of genitourinary system', and '(017) Tuberculosis of other organs'.

5. To use the rapid entry feature, click on the **Rapid Entry** button.

The screenshot shows the 'Brontosaurus, Betty' application window. The 'Diagnoses' tab is selected. In the 'Add/Edit' section, the 'Condition' dropdown is set to '(133.0) (Acanthosis) Scabies' and the 'Diagnosis' dropdown is set to 'Definitive'. The 'Comments' field is empty. A red arrow points to the 'Rapid Entry' button. The 'Save' button is visible. Below the 'Add/Edit' section is a list of conditions with checkboxes, including '(003.1) (Other salmonella infections) Salmonella septicemia', '(007.0) (Other protozoal intestinal diseases) Balantidiasis', '(007.1) (Other protozoal intestinal diseases) Giardiasis', '(007.4) (Other protozoal intestinal diseases) Cryptosporidiosis', '(009.3) (Ill-defined intestinal infections) Diarrhea of presumed infectious origin', '(011) Pulmonary tuberculosis', '(012) Other respiratory tuberculosis', '(013) Tuberculosis of meninges and central nervous system', '(014) Tuberculosis of intestines, peritoneum, and mesenteric glands', '(015) Tuberculosis of bones and joints', '(016) Tuberculosis of genitourinary system', and '(017) Tuberculosis of other organs'.

6. The **Diagnoses Rapid Entry** screen will appear.

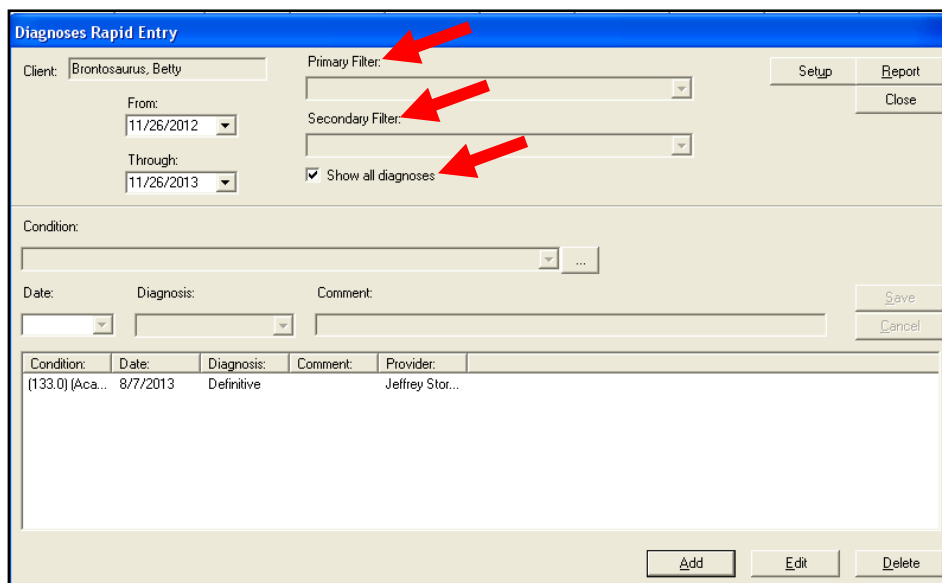


The screenshot shows the 'Diagnoses Rapid Entry' window. A red arrow points to the title bar. The window contains the following elements:

- Client:** Brontosaurus, Betty
- From:** 11/26/2012
- Through:** 11/26/2013
- Primary Filter:** (empty dropdown)
- Secondary Filter:** (empty dropdown)
- ☒ Show all diagnoses
- Condition:** (empty dropdown)
- Date:** (empty dropdown)
- Diagnosis:** (empty dropdown)
- Comment:** (empty text box)
- Buttons:** Setup, Report, Close, Save, Cancel, Add, Edit, Delete
- Table:**

Condition:	Date:	Diagnosis:	Comment:	Provider:
(133.0) (Aca...	8/7/2013	Definitive		Jeffrey Stor...

7. **Show all diagnoses** is selected by default. You can apply **Primary** and **Secondary Filters** to view only one or two diagnoses and run reports by selecting the filter(s) and un-checking **Show all diagnoses**.



This screenshot is identical to the previous one, but with three red arrows highlighting specific controls:

- One arrow points to the **Primary Filter:** dropdown.
- Another arrow points to the **Secondary Filter:** dropdown.
- A third arrow points to the ☒ Show all diagnoses checkbox.

O. Entering Medical Case Notes

1. To enter a case notes, go to the **Encounters** tab, **Case Note** sub-tab.

The screenshot shows the 'Brontosaurus, Betty' software interface. The top menu bar includes 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Merge Client', and 'Delete Client'. Below this is a sub-menu bar with 'Demographics', 'Drug Services', 'Service', 'Annual Review', 'Encounters', 'Referrals', 'HIV C&T', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', and 'Custom Tab 3'. The 'Encounters' tab is selected. Below the sub-menu bar, there is a section for 'Encounter Date: 10/09/2014 | Jeffrey S.' with buttons for 'Create Encounter', 'Delete Encounter', 'Encounter Report', and 'Sharing Options'. A checkbox labeled 'Only show data for this provider' is checked. Below this, there is a section for 'Case Note (for the selected encounter date):' with buttons for 'Rapid Entry' and 'Setup'. The 'Case Note' sub-tab is selected. Below the sub-tab, there is a large text area for 'Edit/Append' with buttons for 'Save Add', 'Append', 'Paste Template', 'Spell Check', 'Thesaurus', and 'Delete'. Below the text area, there is a table with columns 'Provider:', 'Note:', and 'Author:'.

2. Type case notes in the **Edit/Append** field and click the **Save Add** button when done.
NOTE: If you are entering a long series of case notes at one sitting for one client, you may wish to save your changes after each paragraph.

This screenshot is similar to the previous one, but with red arrows pointing to the 'Case Note' sub-tab and the 'Save Add' button. The 'Case Note' sub-tab is selected, and the 'Save Add' button is highlighted. The 'Edit/Append' field is empty, and the 'Provider:', 'Note:', and 'Author:' table is also empty.

3. Note the **Spell Check**, **Thesaurus** and **Paste Template** features.

The screenshot shows the 'Brontosaurus, Betty' application window. The 'Case Note' section is active, displaying a text area for notes. To the right of the text area are buttons for 'Save Add', 'Append', 'Paste Template', 'Spell Check', 'Thesaurus', and 'Delete'. Red arrows point to the 'Spell Check', 'Thesaurus', and 'Paste Template' buttons. The 'Encounter Date' is set to 10/09/2014 for Jeffrey S. The 'Only show data for this provider' checkbox is checked. The 'Vital Signs' tab is selected in the top navigation bar.

Part 12 – HIV Counseling & Testing

The **HIV C&T** (Counseling and Testing) tab can be used to track clients who enter care through an agency's counseling and testing program. The menu options are all yes/no, with the exception of test result.

The screenshot shows the 'Brontosaurus, Betty' application window with the 'HIV C&T' tab selected in the top navigation bar. The 'Add/Edit' section contains fields for 'Pretest Counseling', 'Test', 'Posttest Counseling', and 'Partner Notification'. The 'Test' section includes fields for 'Tested', 'Test Date', and 'Test Result'. The 'Posttest Counseling' section includes fields for 'Posttest Counsel', 'Posttest Date', and 'Reason no Counsel'. The 'Partner Notification' section includes fields for 'Partner Notification Offered' and 'Number Notified'. A 'Comments' field is also present. Below these fields is a table with columns: 'Tested', 'Test Date', 'Test Result', 'Pretest Co...', 'Pretest Date', and 'Provider'. At the bottom are buttons for 'New Test Series', 'Edit Test Series', and 'Delete Test Series'. A red arrow points to the 'HIV C&T' tab in the top navigation bar.

Part 13 – Pregnancy

Input information tied to **Pregnancy** on this tab.

[illegible]

Part 14 – Relations

Entering Relations

The **Relations** tab allows you to enter HIV-negative/affected members of the index client's family into the database in order to provide them services. The process of entering the HIV-negative/affected family member as a new client is similar to entering an HIV-positive client.

1. From the client's details screen, select the **Relations** tab and click the **Create a New Dependent** button.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client **Relations** Custom Tab 1 Unique IDs Custom Tab 3

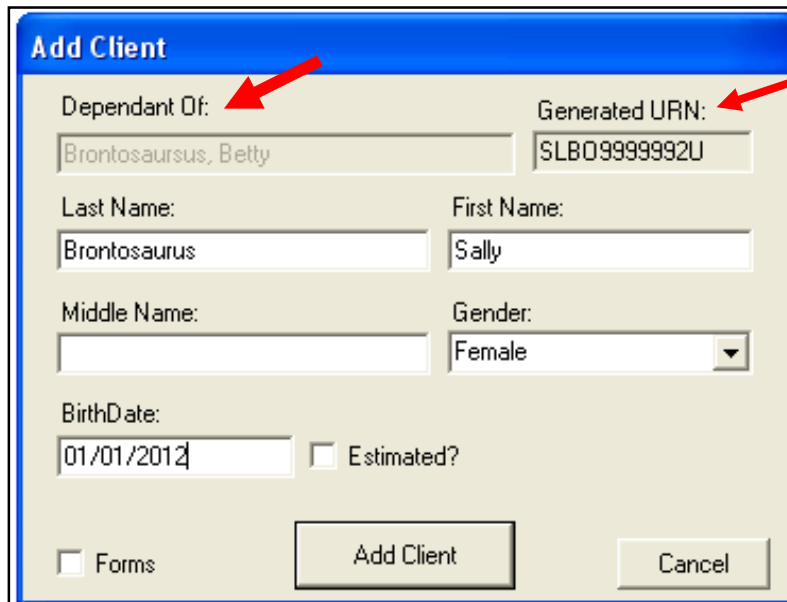
Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy

To revert to a dependent's client information screen, double click the client's record.

Index Client:	Dependent Name:	Birth Date:	Gender:	Relation:	Provider:
Betty Brontosaurus	Sally Rubble	5/5/2006	Female	Parent	Jeffrey Stor...
Betty Brontosaurus	Davy Rubble	1/1/2009	Male	Parent	Jeffrey Stor...
Betty Brontosaurus	Barnaby Rubble	6/13/2000	Male	Parent	Jeffrey Stor...

Create New Dependent Append Dependent Detach Dependent

- The **Add Client** screen will appear. The **Dependant Of** and **Generated URN** fields will self-populate with the index client's information. Complete the remaining fields for the client's dependant as you did for the client. Click **Add Client** when finished with the data entry.



Add Client

Dependant Of: Brontosaurus, Betty Generated URN: SLBO9999992U

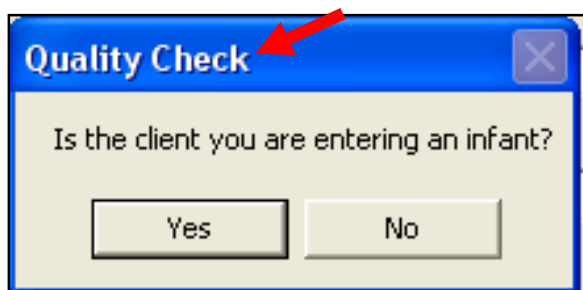
Last Name: Brontosaurus First Name: Sally

Middle Name: Gender: Female

BirthDate: 01/01/2012 ☐ Estimated?

☐ Forms Add Client Cancel

- If the dependant is less than two years old, the **Quality Check** screen will appear when you click on **Add Client**. This is to ensure that you have correctly entered the date of birth.

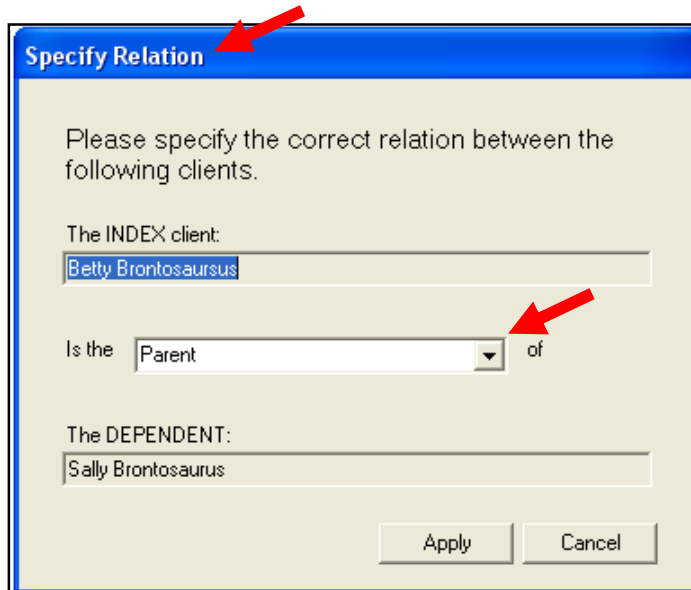


Quality Check

Is the client you are entering an infant?

Yes No

4. If the dependent is not younger than two or older than 70 years of age and you clicked on the **Add Client** button, the **Specify Relation** screen will appear. When establishing a relationship between the index client and a dependent, a full list of relations is available in the **Is the** drop-down menu.

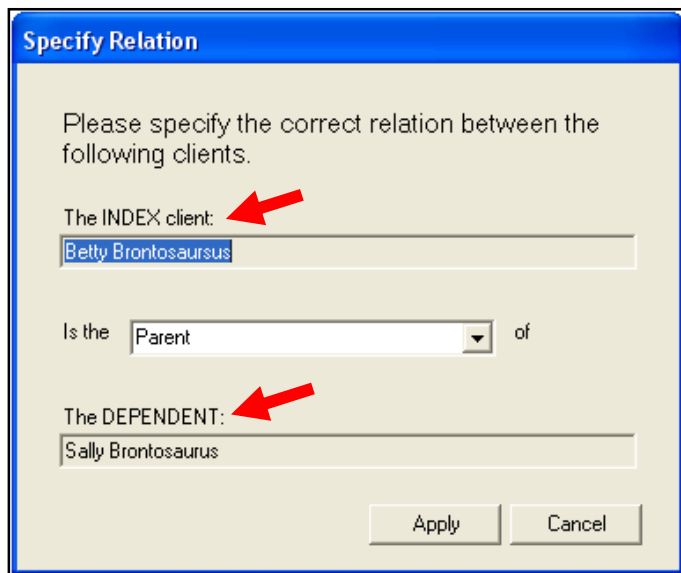


The image shows a dialog box titled "Specify Relation". It contains the following fields and controls:

- Title:** Specify Relation
- Text:** Please specify the correct relation between the following clients.
- The INDEX client:** Betty Brontosaurus
- Is the:** Parent (dropdown menu)
- of:**
- The DEPENDENT:** Sally Brontosaurus
- Buttons:** Apply, Cancel

Red arrows point to the "Specify Relation" title bar and the "Parent" dropdown menu.

5. **The INDEX client** and the **The DEPENDANT** fields will self-populate with the names that were entered previously.



The image shows the same "Specify Relation" dialog box as above, but with red arrows pointing to the "The INDEX client:" label and the "The DEPENDENT:" label.

The INDEX client: Betty Brontosaurus

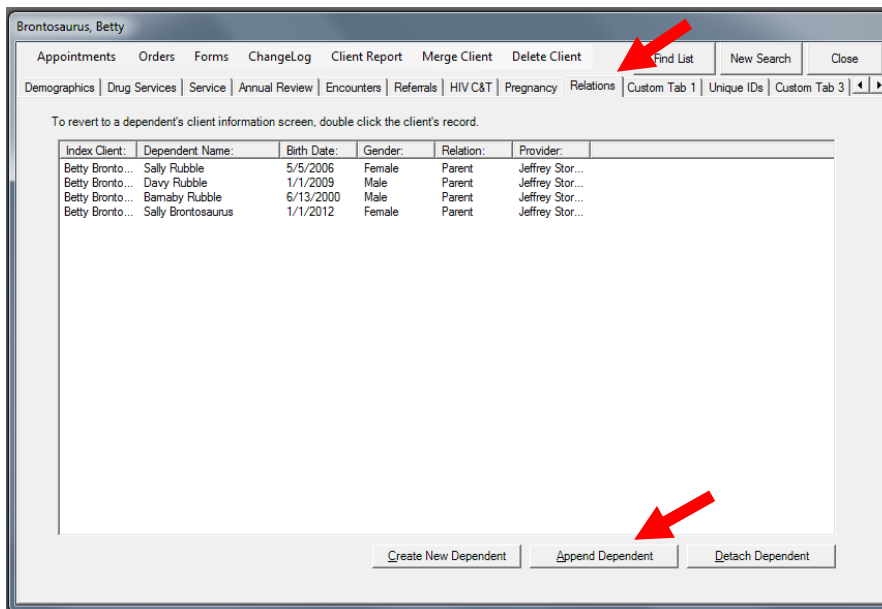
Is the: Parent (dropdown menu)

of:

The DEPENDENT: Sally Brontosaurus

Buttons: Apply, Cancel

6. To identify a relationship with an existing client, select **Append Dependent** from the **Relations** tab.



Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | **Find List** | New Search | Close

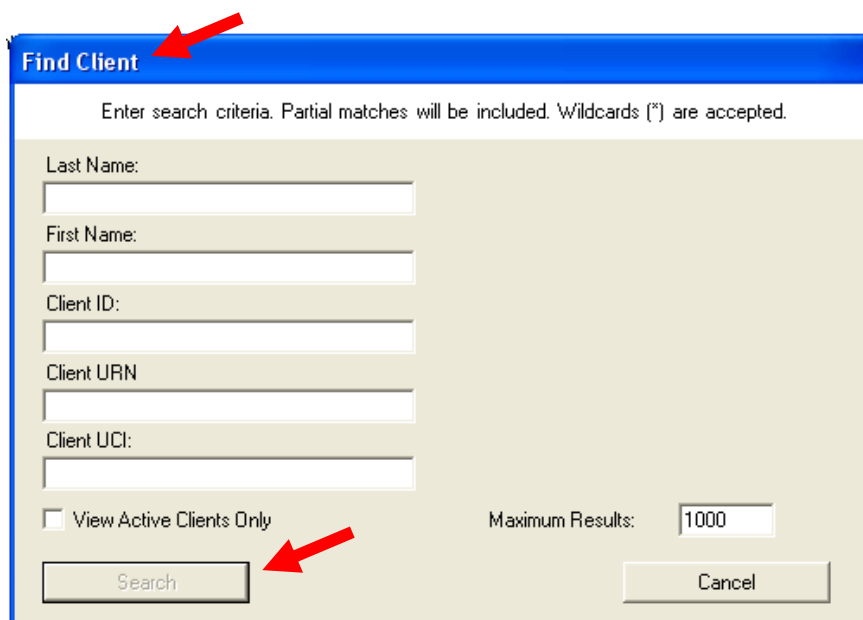
Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | **Relations** | Custom Tab 1 | Unique IDs | Custom Tab 3

To revert to a dependent's client information screen, double click the client's record.

Index Client:	Dependent Name:	Birth Date:	Gender:	Relation:	Provider:
Betty Bronto...	Sally Rubble	5/5/2006	Female	Parent	Jeffrey Stor...
Betty Bronto...	Davy Rubble	1/1/2009	Male	Parent	Jeffrey Stor...
Betty Bronto...	Bamaby Rubble	6/13/2000	Male	Parent	Jeffrey Stor...
Betty Bronto...	Sally Brontosaurus	1/1/2012	Female	Parent	Jeffrey Stor...

Create New Dependent | **Append Dependent** | Detach Dependent

7. The **Find Client** screen will appear. This is the same screen that is used to find any client. Enter search text into any of the fields: **Last Name**, **First Name**, **Client ID**, **Client URN** or **Client UCI** and click on **Search**.



Find Client

Enter search criteria. Partial matches will be included. Wildcards (*) are accepted.

Last Name:

First Name:

Client ID:

Client URN

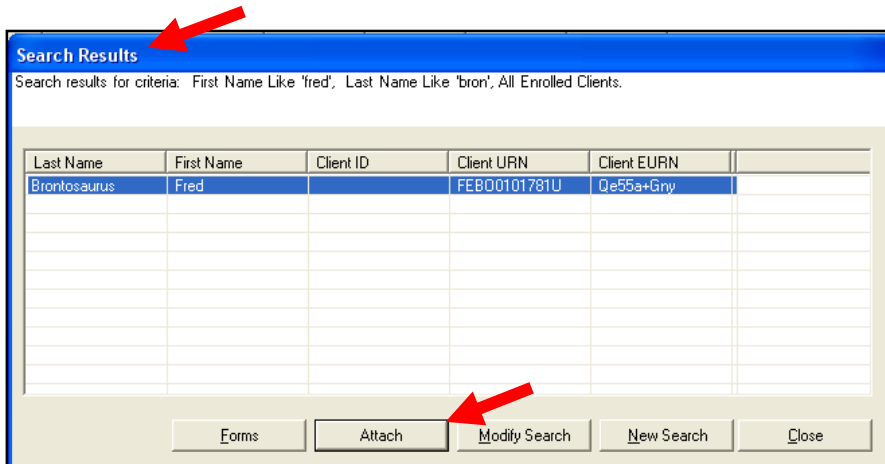
Client UCI:

☐ View Active Clients Only

Maximum Results:

Search **Cancel**

8. The **Search Results** screen is the same as any client search results. Select the client you wish to add as a relation and click on **Attach**.



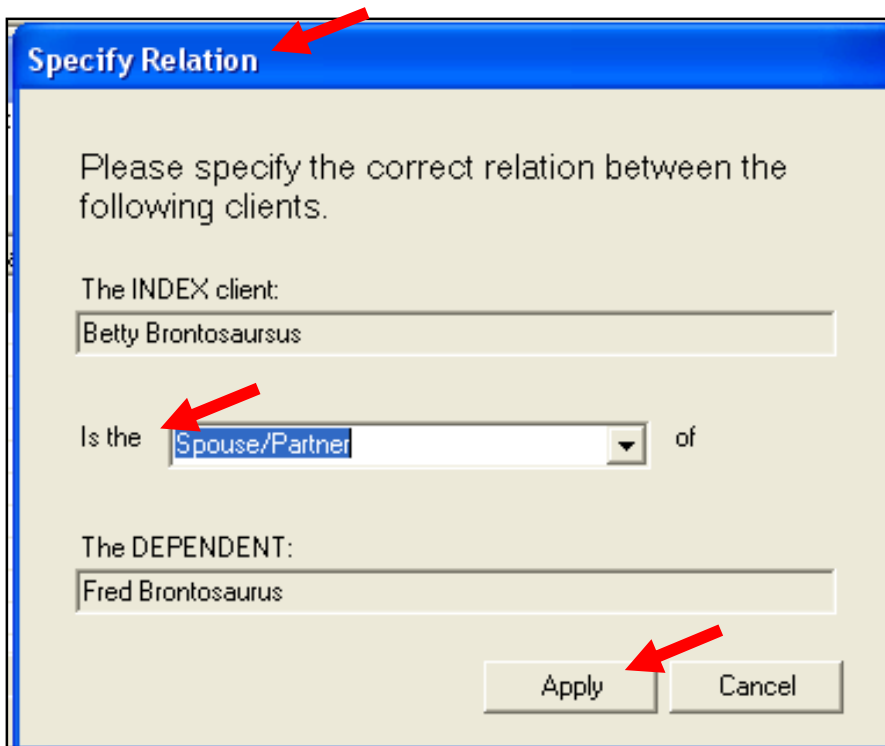
Search Results

Search results for criteria: First Name Like 'fred', Last Name Like 'bron', All Enrolled Clients.

Last Name	First Name	Client ID	Client URN	Client EURN
Brontosaurus	Fred		FE800101781U	Qe55a+Gny

Forms Attach Modify Search New Search Close

9. The **Specify Relation** screen will appear. Select the proper relationship identifier in the **Is the** drop-down menu and click **Apply**.



Specify Relation

Please specify the correct relation between the following clients.

The INDEX client:
Betty Brontosaurus

Is the **Spouse/Partner** of

The DEPENDENT:
Fred Brontosaurus

Apply Cancel

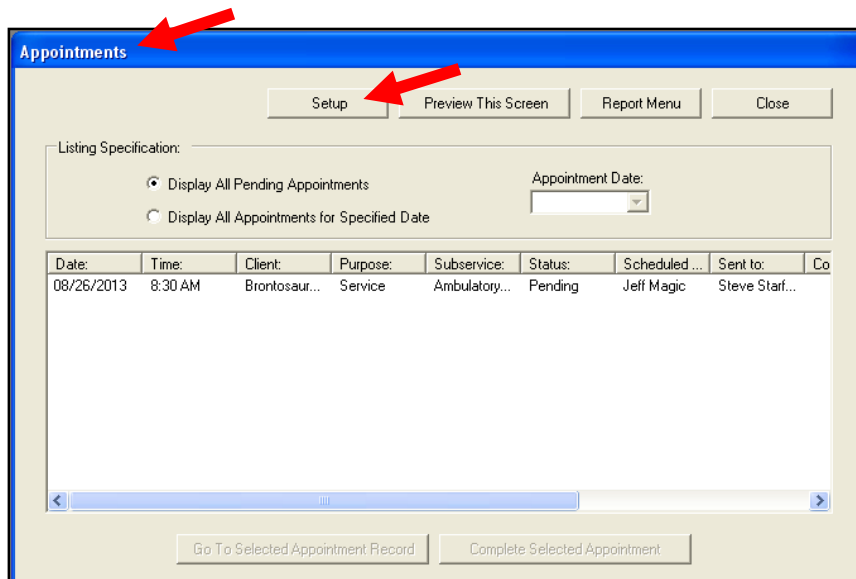
Part 15 – Scheduler

A. Scheduler

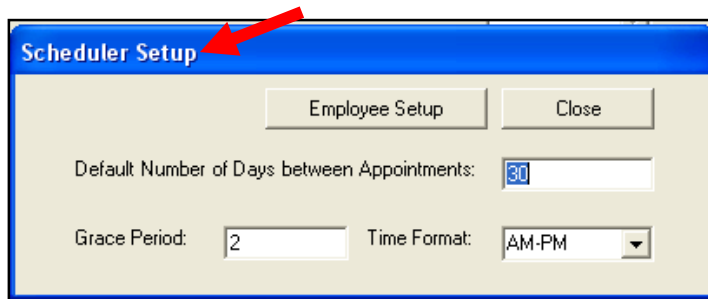
1. To use the Scheduler, click on the **Appointments** button from the **Main Menu**.



2. Select the **Setup** button in the **Appointments** screen.



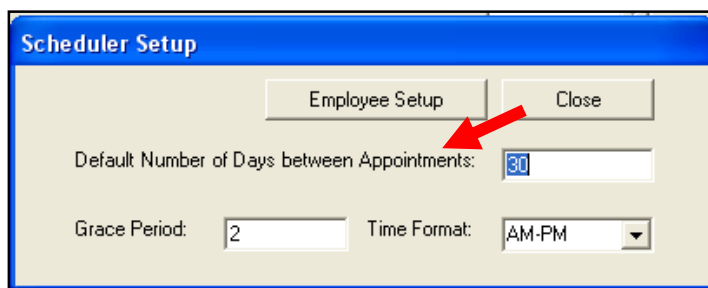
3. The **Scheduler Setup** screen will appear.



The screenshot shows the 'Scheduler Setup' window. At the top, there is a blue title bar with the text 'Scheduler Setup'. Below the title bar, there are two buttons: 'Employee Setup' and 'Close'. The main area contains three fields: 'Default Number of Days between Appointments:' with a text box containing '30', 'Grace Period:' with a text box containing '2', and 'Time Format:' with a dropdown menu showing 'AM-PM'. A red arrow points to the 'Scheduler Setup' title bar.

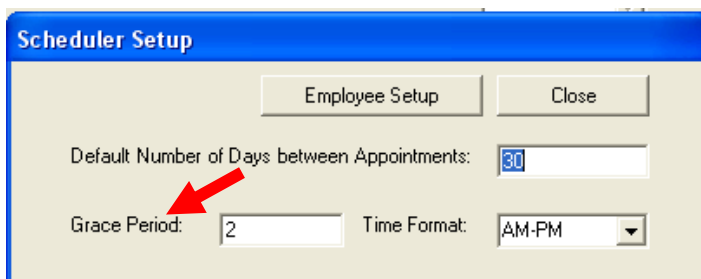
4. Complete the following fields:

- a. **Default Number of Days between Appointments:** CAREWare will automatically schedule another visit in the designated number of days.



This screenshot is identical to the previous one, but a red arrow points to the 'Default Number of Days between Appointments:' text box, which contains the value '30'.

- b. **Grace Period:** This is the number of days after which, upon logging in, CAREWare will automatically set the visit status from **Pending** to **Missed** in the **Status** column on the **Scheduler** tab (see below).



This screenshot is identical to the previous ones, but a red arrow points to the 'Grace Period:' text box, which contains the value '2'.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List **New Search** Close

Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3 Subform Pharmacy Scheduler Performance Measures

Client URN: BTB00101802A
 Client ID: 1234 ☒ Client Uses Scheduler Default Number of Days between Appointments: 30

Add/Edit Appointment:

Date: Time: Subservice: Status: Scheduled by: Sent to:

Comment: Save Cancel

Date:	Time:	Purpose:	Subservice:	Status:	Scheduled ...	Sent to:	Comments:	Provider:	Client L
07/08/2013	8:45 AM	Service	Ambulatory...	Missed	Jeff Magic	Steve Starf...		Jeffrey Stor...	

Add Edit Delete

c. **Employee Setup**: Click on this button to access the **Employee** screen.

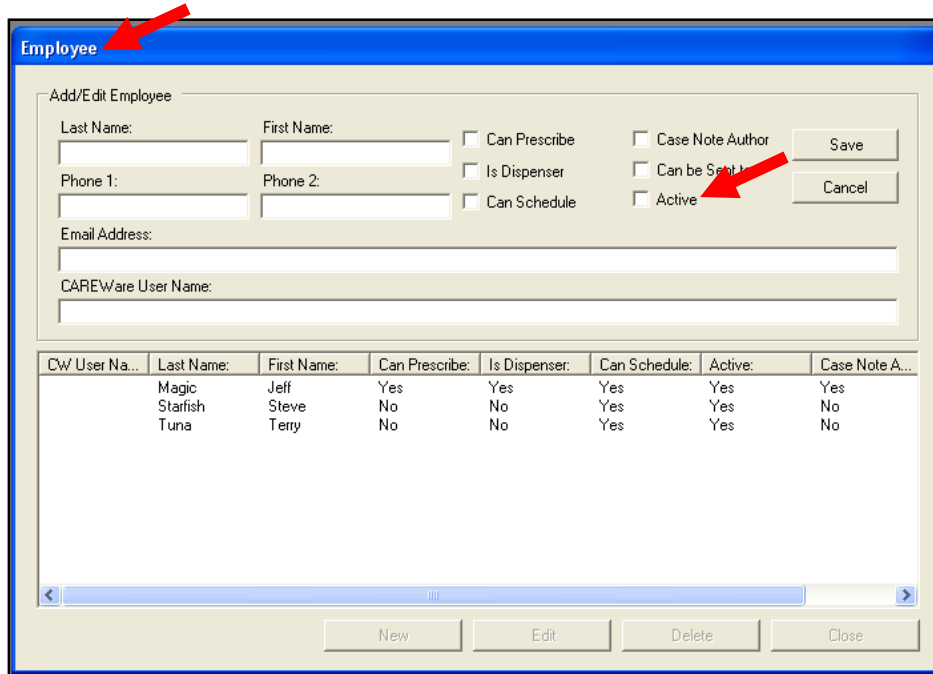
Scheduler Setup

Employee Setup Close

Default Number of Days between Appointments: 30

Grace Period: 2 Time Format: AM-PM

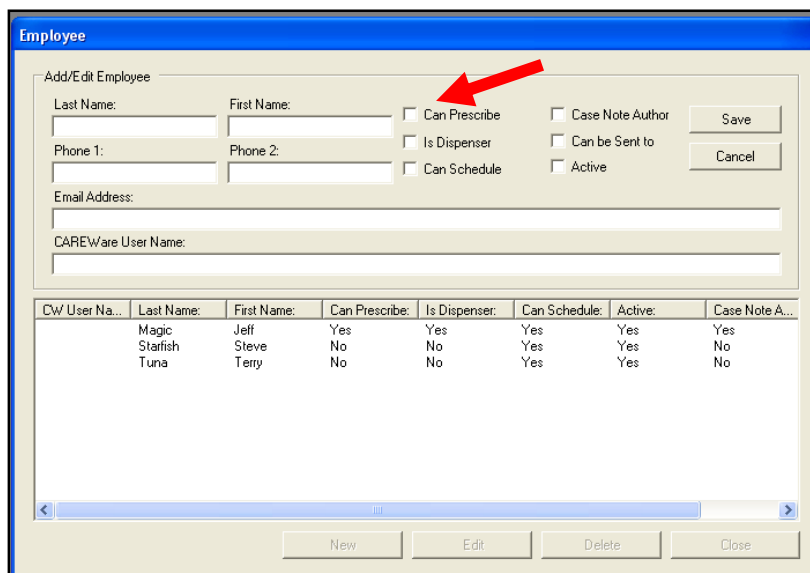
- d. **Employee**: Add clinic employees to the list. Visits can be scheduled with individuals and reports generated to show which patients are scheduled to see each employee. The **Active** box must be checked for the employee to show up in the drop-down menus mentioned below. Once an employee has left the agency, do not delete the person from the **Employee** screen; simply uncheck the **Active** box. This way you will retain their historic data.



The screenshot shows the 'Employee' window with the 'Add/Edit Employee' form. A red arrow points to the 'Active' checkbox, which is currently unchecked. The form includes fields for Last Name, First Name, Phone 1, Phone 2, Email Address, and CAREWare User Name. There are also checkboxes for 'Can Prescribe', 'Is Dispenser', 'Can Schedule', 'Case Note Author', and 'Can be Sent to'. The 'Save' and 'Cancel' buttons are visible.

CW/ User Na...	Last Name:	First Name:	Can Prescribe:	Is Dispenser:	Can Schedule:	Active:	Case Note A...
	Magic	Jeff	Yes	Yes	Yes	Yes	Yes
	Starfish	Steve	No	No	Yes	Yes	No
	Tuna	Terry	No	No	Yes	Yes	No

- e. By checking **Can Prescribe**, the employee will show up on the **Pharmacy** tab under **Clinician** (see below).



The screenshot shows the 'Employee' window with the 'Add/Edit Employee' form. A red arrow points to the 'Can Prescribe' checkbox, which is currently unchecked. The form includes fields for Last Name, First Name, Phone 1, Phone 2, Email Address, and CAREWare User Name. There are also checkboxes for 'Can Prescribe', 'Is Dispenser', 'Can Schedule', 'Case Note Author', and 'Can be Sent to'. The 'Save' and 'Cancel' buttons are visible.

CW/ User Na...	Last Name:	First Name:	Can Prescribe:	Is Dispenser:	Can Schedule:	Active:	Case Note A...
	Magic	Jeff	Yes	Yes	Yes	Yes	Yes
	Starfish	Steve	No	No	Yes	Yes	No
	Tuna	Terry	No	No	Yes	Yes	No

Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 | Subform | Pharmacy | Scheduler | Performance Measures

Client URN: BTB00101802A
 Client ID: 1234 ☒ Client Uses Scheduler Default Number of Days between Appointments: 30

Add/Edit Appointment:

Date: Time: Subservice: Status: Scheduled by: Sent to:

Comment:

Jeff Magic
 Steve Starfish
 Terry Tuna

Cancel

Date:	Time:	Purpose:	Subservice:	Status:	Scheduled ...	Sent to:	Comments:	Provider:	Client L
<div> <div></div> <div></div> <div></div> </div>									

Add Edit Delete

- g. By checking **Case Note Author**, the employee will show up on the **Case Notes** screen under **Author** (see below).

Employee

Add/Edit Employee

Last Name: First Name: ☐ Can Prescribe ☐ Case Note Author Save
 Phone 1: Phone 2: ☐ Is Dispenser ☐ Can be Sent to Cancel
☐ Can Schedule ☐ Active

Email Address:

CAREWare User Name:

CW User Na...	Last Name:	First Name:	Can Prescribe:	Is Dispenser:	Can Schedule:	Active:	Case Note A...
	Magic	Jeff	Yes	Yes	Yes	Yes	Yes
	Starfish	Steve	No	No	Yes	Yes	No
	Tuna	Terry	No	No	Yes	Yes	No

New Edit Delete Close

Case Notes (Rapid Entry)

Client:

From: Through:

☒ Only show this provider

Note:

Date:

Author:

Search

Date	Provider	Case Note	Author

- h. By checking **Can be Sent to**, the employee will show up on the **Scheduler** tab under **Sent to** (see below).

Employee

Add/Edit Employee

Last Name: First Name: ☐ Can Prescribe ☐ Case Notes ☐ Can be Sent to ☐ Active

Phone 1: Phone 2: ☐ Is Dispenser ☐ Can Schedule

Email Address:

CAREWare User Name:

Save Cancel

CW User Na...	Last Name:	First Name:	Can Prescribe:	Is Dispenser:	Can Schedule:	Active:	Case Note A...
	Magic	Jeff	Yes	Yes	Yes	Yes	Yes
	Starfish	Steve	No	No	Yes	Yes	No
	Tuna	Terry	No	No	Yes	Yes	No

Close

Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 | Subform | Pharmacy | Scheduler | Performance Measures

Client URN: 8TB00101802A
 Client ID: 1234 ☒ Client Uses Scheduler Default Number of Days between Appointments: 30

Add/Edit Appointment:


Date: Time: Subservice: Status: Scheduled by: Sent to:

Comment: Save

Jeff Magic
 Steve Starfish
 Terry Tune

Date:	Time:	Purpose:	Subservice:	Status:	Scheduled ...	Sent to:	Comments:	Provider:	Client L
<div> <div> Add Edit Delete </div> </div>									

5. Once complete, click **Close**.



Scheduler Setup

Employee Setup Close

Default Number of Days between Appointments: 30

Grace Period: 2 Time Format: AM-PM

-
-
-
-
-
6. You will be returned to the **Appointments** screen. You can view all outstanding appointments from this screen.

Appointments

Setup Preview This Screen Report Menu Close

Listing Specification:

☒ Display All Pending Appointments
 ☐ Display All Appointments for Specified Date

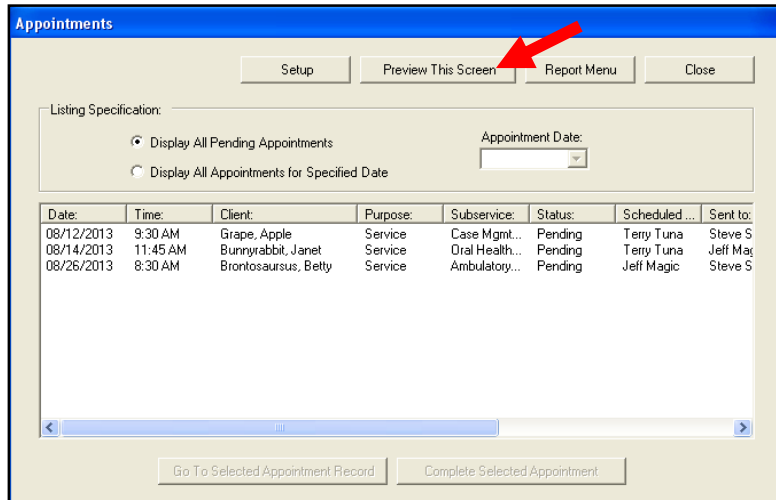
Appointment Date:

Date:	Time:	Client:	Purpose:	Subservice:	Status:	Scheduled ...	Sent to:
08/12/2013	9:30 AM	Grape, Apple	Service	Case Mgmt...	Pending	Terry Tuna	Steve S
08/14/2013	11:45 AM	Bunnyrabbit, Janet	Service	Oral Health...	Pending	Terry Tuna	Jeff Ma
08/26/2013	8:30 AM	Brontosaurus, Betty	Service	Ambulatory...	Pending	Jeff Magic	Steve S

Go To Selected Appointment Record Complete Selected Appointment

7. From the **Appointments** screen, you can:

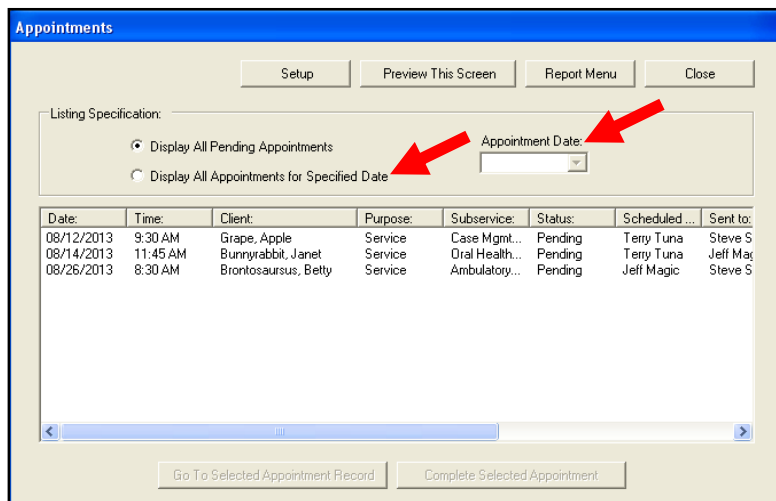
- a. Preview all pending visits by clicking the **Preview This Screen** button.



The screenshot shows the 'Appointments' window. At the top, there are four buttons: 'Setup', 'Preview This Screen', 'Report Menu', and 'Close'. A red arrow points to the 'Preview This Screen' button. Below the buttons is the 'Listing Specification' section, which contains two radio buttons: 'Display All Pending Appointments' (selected) and 'Display All Appointments for Specified Date'. To the right of these radio buttons is an 'Appointment Date:' label and a date selection dropdown menu. Below this is a table with columns: Date, Time, Client, Purpose, Subservice, Status, Scheduled, and Sent to. The table contains three rows of data. At the bottom of the window are two buttons: 'Go To Selected Appointment Record' and 'Complete Selected Appointment'.

Date:	Time:	Client:	Purpose:	Subservice:	Status:	Scheduled ...	Sent to:
08/12/2013	9:30 AM	Grape, Apple	Service	Case Mgmt...	Pending	Terry Tuna	Steve S
08/14/2013	11:45 AM	Bunnyrabbit, Janet	Service	Oral Health...	Pending	Terry Tuna	Jeff Ma
08/26/2013	8:30 AM	Brontosaurus, Betty	Service	Ambulatory...	Pending	Jeff Magic	Steve S

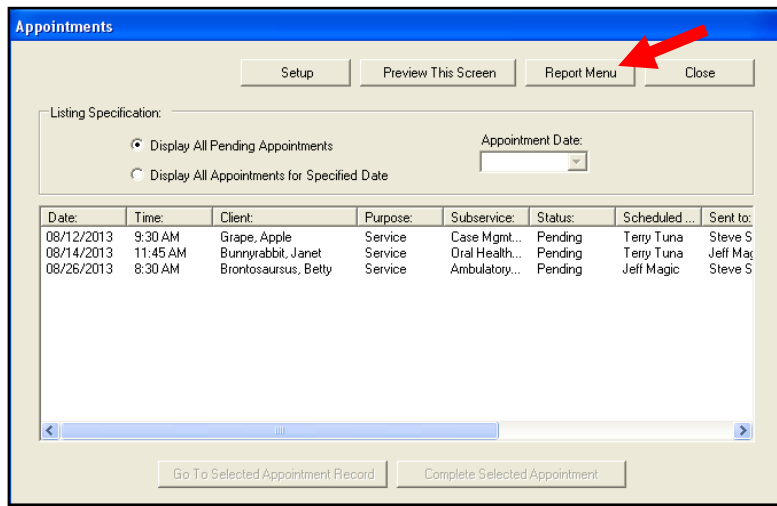
- b. **Display All Appointments for Specified Date** by clicking on this option and selecting the date from the **Appointment Date** drop-down menu. (You may want to generate a list for the next day's activities.)



This screenshot is identical to the one above, but with two red arrows. One arrow points to the 'Display All Appointments for Specified Date' radio button, and the other points to the 'Appointment Date:' dropdown menu.

Date:	Time:	Client:	Purpose:	Subservice:	Status:	Scheduled ...	Sent to:
08/12/2013	9:30 AM	Grape, Apple	Service	Case Mgmt...	Pending	Terry Tuna	Steve S
08/14/2013	11:45 AM	Bunnyrabbit, Janet	Service	Oral Health...	Pending	Terry Tuna	Jeff Ma
08/26/2013	8:30 AM	Brontosaurus, Betty	Service	Ambulatory...	Pending	Jeff Magic	Steve S

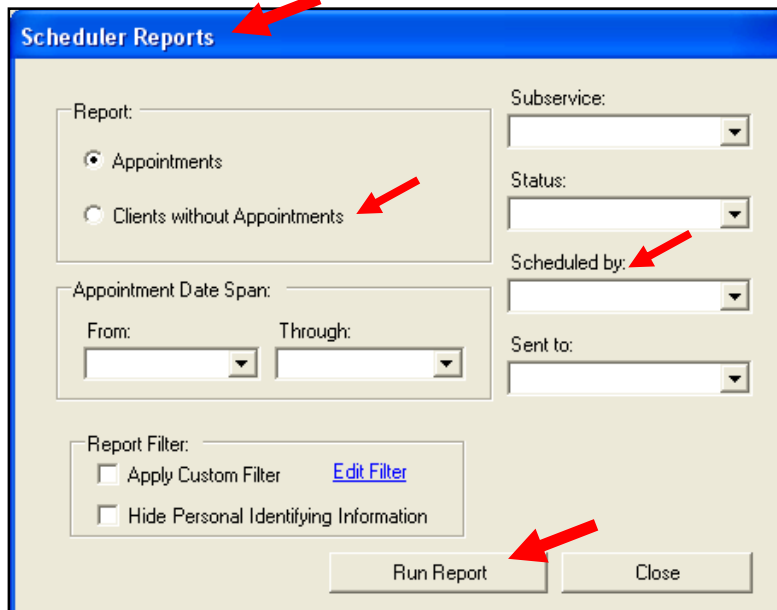
- c. Other reports are available by selecting the **Report Menu** button.



The screenshot shows the 'Appointments' window. At the top, there are buttons for 'Setup', 'Preview This Screen', 'Report Menu' (highlighted with a red arrow), and 'Close'. Below these is a 'Listing Specification' section with two radio buttons: 'Display All Pending Appointments' (selected) and 'Display All Appointments for Specified Date'. To the right of these is an 'Appointment Date:' dropdown menu. Below the specification section is a table with columns: Date, Time, Client, Purpose, Subservice, Status, Scheduled by, and Sent to. The table contains three rows of appointment data. At the bottom of the window are two buttons: 'Go To Selected Appointment Record' and 'Complete Selected Appointment'.

Date:	Time:	Client:	Purpose:	Subservice:	Status:	Scheduled ...	Sent to:
08/12/2013	9:30 AM	Grape, Apple	Service	Case Mgmt...	Pending	Terry Tuna	Steve S
08/14/2013	11:45 AM	Bunnyrabbit, Janet	Service	Oral Health...	Pending	Terry Tuna	Jeff Ma
08/26/2013	8:30 AM	Brontosaurus, Betty	Service	Ambulatory...	Pending	Jeff Magic	Steve S

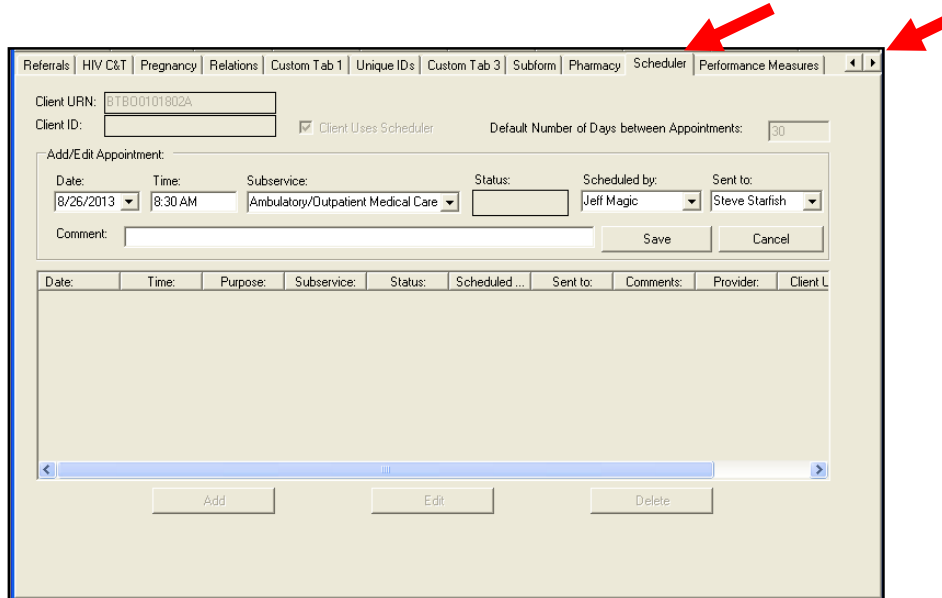
- d. The **Scheduler Reports** screen will appear. This screen offers a number of options, such as **Clients without Appointments** and **Scheduled by**, from which customized reports regarding appointments can be run. After selecting the preferred options, click on **Run Report**.



The screenshot shows the 'Scheduler Reports' window. At the top, the title 'Scheduler Reports' is highlighted with a red arrow. Below the title, there are several sections. The 'Report:' section has two radio buttons: 'Appointments' (selected) and 'Clients without Appointments' (highlighted with a red arrow). To the right of this are dropdown menus for 'Subservice:', 'Status:', 'Scheduled by:' (highlighted with a red arrow), and 'Sent to:'. Below the 'Report:' section is an 'Appointment Date Span:' section with 'From:' and 'Through:' dropdown menus. At the bottom left is a 'Report Filter:' section with two checkboxes: 'Apply Custom Filter' (with a blue 'Edit Filter' link next to it) and 'Hide Personal Identifying Information'. At the bottom right are two buttons: 'Run Report' (highlighted with a red arrow) and 'Close'.

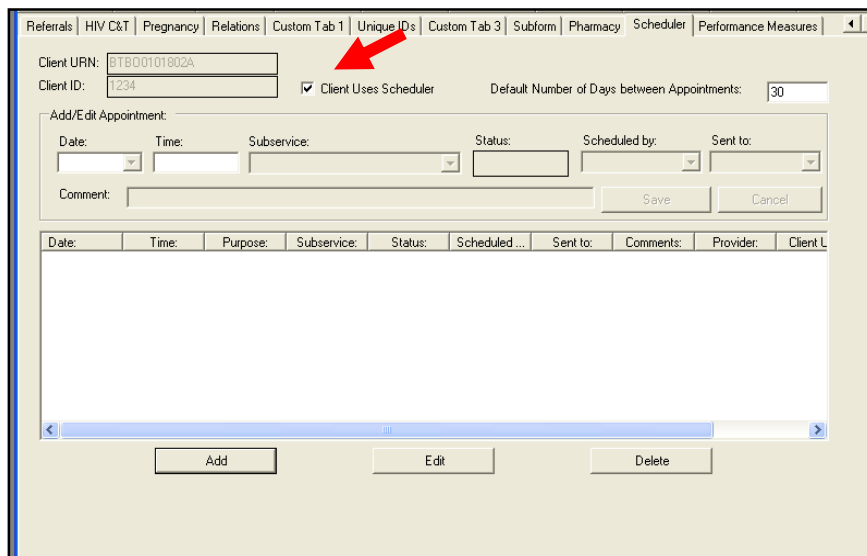
B. Scheduling an Appointment

1. To schedule an appointment, enter a client's record and select the **Scheduler** sub-tab. You may have to scroll to the right (▶) on the sub-tab bar to locate the **Scheduler** sub-tab.



The screenshot shows a software interface with a tabbed menu at the top. The tabs are: Referrals, HIV C&T, Pregnancy, Relations, Custom Tab 1, Unique IDs, Custom Tab 3, Subform, Pharmacy, Scheduler, and Performance Measures. The 'Scheduler' tab is selected and highlighted in orange. Two red arrows point to the right-pointing arrow icons on the far right of the tab bar, indicating how to scroll to find the 'Scheduler' tab. Below the tabs, the 'Client URN' is 'BT800101802A' and 'Client ID' is empty. A checkbox labeled 'Client Uses Scheduler' is checked. To its right is a field 'Default Number of Days between Appointments' with the value '30'. Below this is the 'Add/Edit Appointment' section with fields for Date (8/26/2013), Time (8:30 AM), Subservice (Ambulatory/Outpatient Medical Care), Status (empty), Scheduled by (Jeff Magic), and Sent to (Steve Starfish). There is also a Comment field and 'Save' and 'Cancel' buttons. At the bottom, there is a table with columns: Date, Time, Purpose, Subservice, Status, Scheduled ..., Sent to, Comments, Provider, and Client L. The table is currently empty. Below the table are 'Add', 'Edit', and 'Delete' buttons.

2. Check the **Client Uses Scheduler** option.



This screenshot is similar to the previous one, showing the 'Scheduler' sub-tab. In this view, the 'Client ID' field is filled with '1234'. A red arrow points to the 'Client Uses Scheduler' checkbox, which is checked. The 'Default Number of Days between Appointments' is still '30'. The 'Add/Edit Appointment' section and the empty table at the bottom are also visible.

3. Click **Add** to add new appointment.

The screenshot shows the 'Appointment Scheduler' tab in a software application. At the top, there are tabs for 'Referrals', 'HIV C&T', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', 'Custom Tab 3', 'Subform', 'Pharmacy', 'Scheduler', and 'Performance Measures'. Below these, the 'Client URN' is 'BT800101802A' and 'Client ID' is '1234'. A checkbox 'Client Uses Scheduler' is checked, and 'Default Number of Days between Appointments' is '30'. The 'Add/Edit Appointment' section has fields for 'Date', 'Time', 'Subservice', 'Status', 'Scheduled by', and 'Sent to'. Below these is a 'Comment' field and 'Save' and 'Cancel' buttons. At the bottom, there is a table with columns: 'Date', 'Time', 'Purpose', 'Subservice', 'Status', 'Scheduled ...', 'Sent to', 'Comments', 'Provider', and 'Client L'. Below the table are 'Add', 'Edit', and 'Delete' buttons. A red arrow points to the 'Add' button.

4. In the **Add/Edit Appointment** field, select the **Date** and enter the **Time**.

This screenshot shows the same 'Appointment Scheduler' interface as the previous one, but with the 'Date' and 'Time' fields in the 'Add/Edit Appointment' section filled. The 'Date' field shows '8/26/2013' and the 'Time' field shows '9:30 AM'. Red arrows point to these two fields. The 'Subservice' field is now 'Ambulatory/Outpatient Medical Care', 'Status' is empty, 'Scheduled by' is 'Jeff Magic', and 'Sent to' is 'Steve Starfish'. The 'Comment' field and 'Save'/'Cancel' buttons are still present. The table at the bottom and the 'Add', 'Edit', and 'Delete' buttons remain the same.

5. Select the **Subservice** for which the appointment is scheduled from the drop-down menu.

The screenshot shows the 'Scheduler' tab in a software interface. At the top, there are tabs for 'Referrals', 'HIV C&T', 'Pregnancy', 'Relations', 'Custom Tab 1', 'Unique IDs', 'Custom Tab 3', 'Subform', 'Pharmacy', 'Scheduler', and 'Performance Measures'. Below these, the 'Client URN' is 'BTB00101802A' and 'Client ID' is empty. A checkbox 'Client Uses Scheduler' is checked. To the right, 'Default Number of Days between Appointments' is set to '30'. The 'Add/Edit Appointment' section contains fields for 'Date' (8/26/2013), 'Time' (8:30 AM), 'Subservice' (Ambulatory/Outpatient Medical Care), 'Status' (empty), 'Scheduled by' (Jeff Magic), and 'Sent to' (Steve Starfish). A red arrow points to the 'Subservice' dropdown menu. Below these fields is a 'Comment' field and 'Save' and 'Cancel' buttons. At the bottom, there is a table with columns: Date, Time, Purpose, Subservice, Status, Scheduled..., Sent to, Comments, Provider, and Client L. The table is currently empty. Below the table are 'Add', 'Edit', and 'Delete' buttons.

6. Select the staff who scheduled the appointment in **Scheduled by** drop-down menu.

This screenshot is identical to the one above, showing the 'Scheduler' tab. The 'Subservice' dropdown menu is still highlighted with a red arrow. In this image, the 'Scheduled by' dropdown menu is also highlighted with a red arrow, pointing to 'Jeff Magic'. The rest of the form, including the 'Client URN', 'Client ID', 'Default Number of Days between Appointments', 'Add/Edit Appointment' fields, 'Comment' field, 'Save' and 'Cancel' buttons, and the empty table at the bottom, remains the same.

7. Select the provider the client will be seeing from the **Sent to** drop-down menu and click **Save**.

Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3 | Subform | Pharmacy | Scheduler | Performance Measures

Client URN: 8T800101802A
Client ID: ☒ Client Uses Scheduler Default Number of Days between Appointments: 30

Add/Edit Appointment:

Date: 8/26/2013 Time: 8:30 AM Subservice: Ambulatory/Outpatient Medical Care Status: Scheduled by: Jeff Magic Sent to: Steve Starfish

Comment: Save Cancel

Date:	Time:	Purpose:	Subservice:	Status:	Scheduled ...	Sent to:	Comments:	Provider:	Client L
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Add Edit Delete

Chapter III – Specialty Data And Functionality

Background – CAREWare allows some customization. In order to cut down on the number of different data systems our customers have to input data into, the HIV/AIDS Section has customized our instance of CAREWare to track HOPWA and Eligibility data. By including HOPWA data in our system, we can produce portions of the HOPWA APR. This can help relieve agencies of the burden of maintaining an additional data system to collect HOPWA information. The same is true of our Eligibility Module. Staff across the state can verify eligibility by reviewing the client's record electronically within the database. Additionally, some functionality crosses between agencies. Two examples are referrals and data sharing. Agencies may send each other referrals for service and requests for sharing of client data.

Part 16 – Referrals

1. To send a client referral to another agency, enter the client's record. From the **Referrals** tab, select the **F1: Add Referral** hyperlink.

The screenshot shows the 'Add/Edit Referral Information' window in CAREWare. The 'Referrals' tab is active in the top navigation bar. The window contains several input fields: 'Referral Date', 'Type', 'Refer-To Provider', 'Requested Service Category Type', and 'Referral Class'. There are also fields for 'Referral Status', 'Referral Complete Date', and 'Referral Comments'. At the bottom left, there are three hyperlinks: 'F1: Add Referral', 'F2: Edit Referral', and 'Del: Delete Referral'. A red arrow points to the 'F1: Add Referral' hyperlink. Another red arrow points to the 'Add' button in the 'Referral Date' field. Below the hyperlinks is a search bar and a table with columns: 'Direction', 'Referral D...', 'Provider', 'Service Ca...', 'Status', 'Completed...', 'Referral CL...', and 'Comments'. The table is currently empty.

2. In the **Add/Edit Referral Information** field, enter:
 - a. **Referral Date**
 - b. **Type**. An **Internal** referral allows you to send to another agency in the state's CAREWare network. An **External** referral represents an agency that is not on our network. An **External** referral does not actually go to anyone; it is simply a way to track referrals. When an **Internal** referral is sent, the receiving agency will be notified the client has been referred to them for service.
 - c. **Refer-To Provider**
 - d. **Requested Service Category Type**: For what type of service is the referral?
 - e. **Referral Class**: An additional level of specification for the referral. This field is optional.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custr...

Add/Edit Referral Information

Referral Date: 8/12/2013 Type: Internal Refer-To Provider: Richs Clinic Add Requested Service Category Type: Outpatient/Ambulatory Medical Care Referral Class: Cardiology

Referral Status: Pending Referral Complete Date: Referral Comments:

☐ Silent Referral Save Cancel

3. Once all the data is entered, click **Save**.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custr...

Add/Edit Referral Information

Referral Date: 8/12/2013 Type: Internal Refer-To Provider: Richs Clinic Add Requested Service Category Type: Outpatient/Ambulatory Medical Care Referral Class: Cardiology

Referral Status: Pending Referral Complete Date: Referral Comments:

☐ Silent Referral Save Cancel

4. You will return to the **Referrals** tab. Note that the **Status** is pending and the **Completed Date** is blank.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custr...

Add/Edit Referral Information

Referral Date: Referral Date: Referral Date: Add Requested Service Category Type: Referral Class:

Referral Status: Referral Complete Date: Referral Comments:

☐ Silent Referral Save Cancel


F1: Add Referral F2: Edit Referral Del: Delete Referral

Search 1 / 1

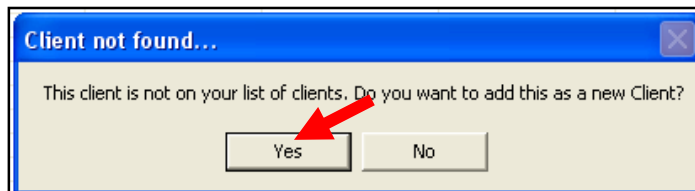
Direction	Referral Date	Provider	Service Category	Status	Completed Date	Referral Class	Comments
Outgoing	8/12/2013	Richs Clinic	Outpatient/Ambulatory Medical Care	Pending		Cardiology	

-
- The screenshot shows the CAREWare Main Menu. At the top is a blue header bar with the text 'Main Menu' in white. Below this, the interface is divided into three main sections. The left section features the HRSA logo (a yellow diamond with a cross) and the text 'Department of Health and Human Services' and 'Health Resources and Services Administration'. The middle section is a vertical list of menu items: 'Add Client', 'Find Client', 'Reports', 'Drug Inventory System', 'Appointments', 'Orders', 'Administrative Options', 'My Settings', 'Rapid Service Entry', 'Log Off', and 'Exit'. The right section contains a list of system messages: 'System Messages', '1 Incoming Referral', '1 outgoing share requests', 'User Messages', 'About CAREWare', and 'Refresh Messages'. At the bottom right, it says 'State of Florida Production CAREWare Build 759 -- Updated 06/07/2013'. Three red arrows are overlaid on the image: one pointing to the 'Main Menu' header, one pointing to the 'System Messages' link, and one pointing to the '1 Incoming Referral' link.
- Main Menu**
- Department of Health and Human Services
HRSA
 Health Resources and Services Administration
- Add Client
 Find Client
 Reports
 Drug Inventory System
 Appointments
 Orders
 Administrative Options
 My Settings
 Rapid Service Entry
 Log Off
 Exit
- System Messages**
- 1 Incoming Referral
- 1 outgoing share requests
- User Messages
- About CAREWare
- Refresh Messages
- State of Florida Production CAREWare
 Build 759 -- Updated 06/07/2013

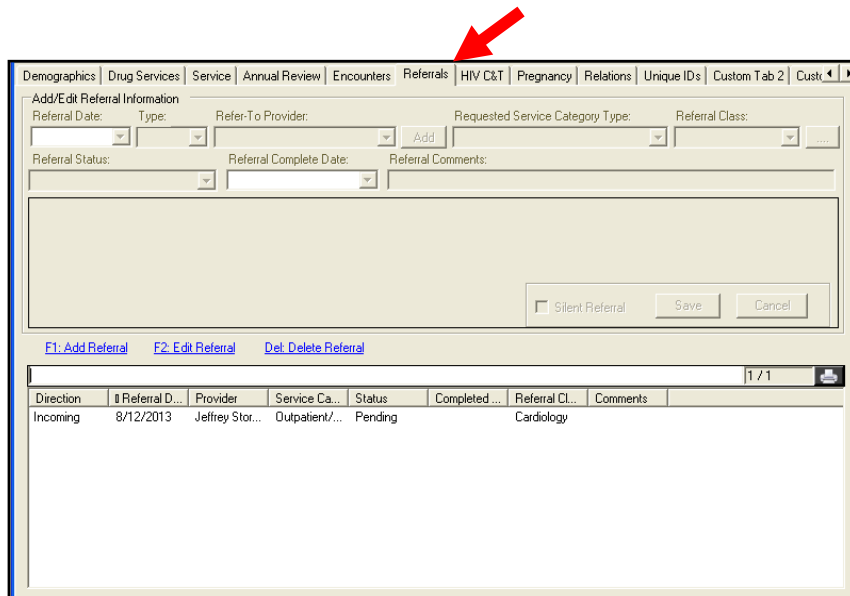
- [illegible]

- 

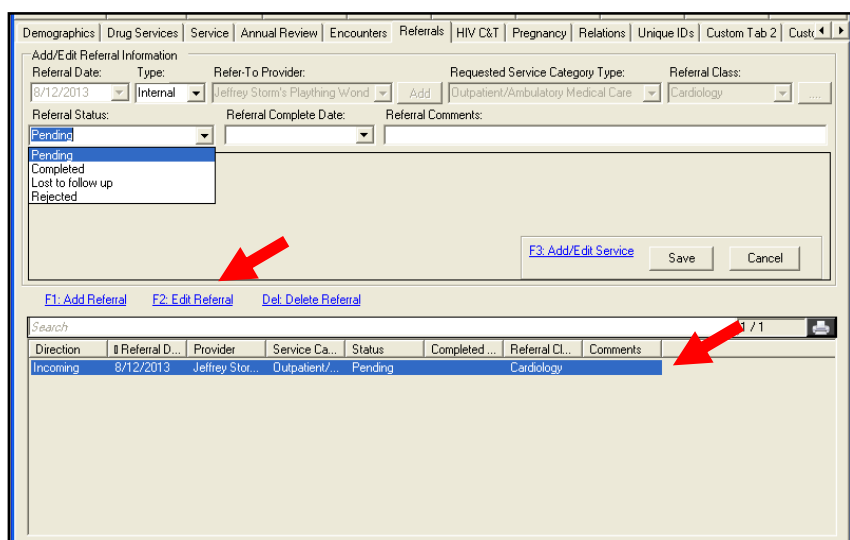
8. The client will be brought into the receiving agency's domain by clicking **Yes** on the **Client not found...** screen.



9. The **Referrals** tab will appear.



10. Click on the referral from the list in the lower half of the screen and choose the **F2: Edit Referral** hyperlink.



11. Update the **Referral Status** and **Referral Completed Date**. The **Referral Comments** is an optional field. To add the service that corresponds to the referral, choose **F3: Add/Edit Service**.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Unique IDs | Custom Tab 2 | Cust...

Add/Edit Referral Information

Referral Date: 8/12/2013 Type: Internal Refer-To Provider: Jeffrey Storm's Plaything World Add Requested Service Category Type: Outpatient/Ambulatory Medical Care Referral Class: Cardiology

Referral Status: Pending Referral Complete Date: Referral Comments:

Pending
Completed
Lost to follow up
Rejected

F3: Add/Edit Service Save Cancel

F1: Add Referral F2: Edit Referral Del: Delete Referral

Search 1 / 1

Direction	Referral D...	Provider	Service Ca...	Status	Completed ...	Referral Cl...	Comments
Incoming	8/12/2013	Jeffrey Stor...	Outpatient/...	Pending		Cardiology	

12. Once a service is added, the **Referrals** tab will become active again. Click **Save**.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Unique IDs | Custom Tab 2 | Cust...

Add/Edit Referral Information

Referral Date: 8/12/2013 Type: Internal Refer-To Provider: Jeffrey Storm's Plaything World Add Requested Service Category Type: Outpatient/Ambulatory Medical Care Referral Class: Cardiology

Referral Status: Completed Referral Complete Date: 8/12/2013 Referral Comments:

F3: Add/Edit Service Save Cancel

F1: Add Referral F2: Edit Referral Del: Delete Referral

Search 1 / 1

Direction	Referral D...	Provider	Service Category	Status	Completed ...	Referral Cl...	Comments
Incoming	8/12/2013	Jeffrey Stor...	Outpatient/Ambulatory Medical Care	Completed	8/12/2013	Cardiology	

13. The screen below illustrates what the receiving agency sees. Notice that the **Direction** is **Incoming**.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Unique IDs | Custom Tab 2 | Cust...

Add/Edit Referral Information

Referral Date: 8/12/2013 Type: Internal Refer-To Provider: Jeffrey Storm's Plaything World Add Requested Service Category Type: Outpatient/Ambulatory Medical Care Referral Class: Cardiology

Referral Status: Completed Referral Complete Date: 8/12/2013 Referral Comments:

F3: Add/Edit Service Save Cancel

F1: Add Referral F2: Edit Referral Del: Delete Referral

Search 1 / 1

Direction	Referral D...	Provider	Service Category	Status	Completed ...	Referral Cl...	Comments
Incoming	8/12/2013	Jeffrey Stor...	Outpatient/Ambulatory Medical Care	Completed	8/12/2013	Cardiology	

14. Viewing at the **Referrals** tab from the sending agency, the **Status** and **Completed Date** are updated. Notice that the **Direction** is **Outgoing**.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Cust...

Add/Edit Referral Information

Referral Date: 8/12/2013 Type: Internal Refer-To Provider: Richs Clinic Add Requested Service Category Type: Outpatient/Ambulatory Medical Care Referral Class: Cardiology

Referral Status: Completed Referral Complete Date: 8/12/2013 Referral Comments:

☐ Silent Referral Save Cancel

F1: Add Referral F2: Edit Referral Del: Delete Referral

Search 1 / 1

Direction	Referral D...	Provider	Service Category	Status	Completed Date	Referral Cl...	Comments
Outgoing	8/12/2013	Richs Clinic	Outpatient/Ambulatory Medical Care	Completed	8/12/2013	Cardiology	

Part 17 – Forms

A. Eligibility Forms

All eligibility forms and information required under Florida Administrative Code Rule 64D-4 must be entered into the state CAREWare database.

Paper Enrollment

Eligibility staff may use paper forms to determine eligibility for new clients if:

- The state CAREWare is not available due to server/network issues
- Eligibility is being conducted off-site and access to CAREWare is not available

All paperwork must be entered and/or scanned into state CAREWare once service has been restored or you have access to the database.

All information must be entered within two weeks of interviewing the client.

State CAREWare Documents

The following documents must be completed in state CAREWare under the **Forms tab:**

- Eligibility Staff Assessment Worksheet (once at initial appointment or if the file is closed for more than a year)
- Six Month Recertification Review Form (every six months after initial certification)
- Notice of Eligibility or Ineligibility (every six months)
- Insurance Waiver Form (as needed)

All forms are custom sub-forms; that is, these forms are kept each time they are completed and will provide a history over time. When it is time to complete any of the documentation on the **Forms** tab, a new form will be added. DO NOT edit any previous forms.

No signatures are required on the **Eligibility Staff Assessment Worksheet**, **Six Month Recertification Review Form** or **Insurance Waiver Form**, **Notice of Ineligibility**.

Print the **Notice of Eligibility** for signatures, scan the signed document, and save in CAREWare under the **Unique ID** tab under **Attachments**.

Adding Forms

1. Click the **Forms** button

The screenshot shows a client record form for 'Brontosaurus, Betty'. The 'Forms' button in the top navigation bar is highlighted with a red arrow. The form contains various fields for client information, including demographics, enrollment status, and medical history.

Demographics		
First Name:	Middle Name:	Client URN
Betty		BTBO0101802A
Last Name:		Encrypted URN:
Brontosaurus		jowkdAtoYM
Gender:	Date of Birth:	Est?
Female	1/1/1980	<input type="checkbox"/>
Sex at Birth:	Encrypted UCI:	
Female	6C2AD91C340E36A880C4D80B98EA400B1184F473A	
Client ID:		
1234		
Street Address: <input checked="" type="checkbox"/> Include on label report		
987 Blue Road		
City:	State:	Zip Code:
Tallahassee	Florida	32399
County:	Phone Number:	
Leon	850-555-4444	
Race(s):	Asian Subgroup:	
White, Asian	Filipino	
Ethnicity:	Hispanic Subgroup:	
Hispanic	Cuban	

Enrollment Status		
Enrollment Status:	Enrollment Date:	Case Closed Date:
Active	9/20/2012	
Vital Status:	Date of Death:	
Alive		
HIV Status:	HIV+ Date:	Est?
HIV-positive (AIDS status)	7/1/2012	<input type="checkbox"/>
AIDS Date:	Est?	
	<input type="checkbox"/>	
HIV Risk Factors:		
Heterosexual Contact		

Notes			
Common Notes	Provider Notes	User Messages	Case Notes

2. The **CAREWare Custom Form Designer** screen will appear. Under the **Forms Select** menu, click on the appropriate hyperlink (**Add _____**) to navigate to the desired form. You may also use a keyboard shortcut to open the form by pressing the keyboard's corresponding F key. For example, you can open the **Add Eligibility Staff Assessment Worksheet** by pressing F1.

The screenshot shows the 'CAREWare Custom Form Designer' window. The 'Form Select' menu is open, displaying a list of forms with their corresponding F keys. A red arrow points to the 'Add Eligibility Staff Assessment Worksheet' option, which is associated with F1.

F Key	Form Name
F1	Add Eligibility Staff Assessment Worksheet
F2	Add Insurance Waiver Form
F3	Add Minority AIDS Initiative
F4	Add Notice of Eligibility
F5	Add Notice of Ineligibility
F6	Add Six Month Recertification Review Form
Esc	Exit

3. The example below illustrates the **Eligibility Staff Assessment Worksheet**. Begin by clicking the **State** option in the upper left corner. This opens the form's fields for inputting information.

CAREWare Custom Form Designer

Form Add Brontosaurus, Betty > All Forms for Past 12 Months

F1 Save/Close
PgUp Previous Page
PgDn Next Page
Esc Back
Ctrl-Z Undo
Ctrl-Y Redo
Ctrl-P Print

☒ **State**

Eligibility Staff Assessment Worksheet

To be completed by eligibility staff to document applicant's eligibility status during enrollment.

Applicants Name Address

Name of Agency Address

Eligibility Staff Phone Number

Proof of HIV: An applicant must have documentation of a medical diagnosis of HIV disease. A laboratory test documenting confirmed HIV infection is required. Check the appropriate box.

A confirmed positive HIV antibody test result (Reactive EIA/ELISA screening test confirmed by Western Blot or Immunofluorescence Assay (IFA) or Nucleic Acid Testing (Aptima) by blood, oral fluid or urine. ☐

A positive HIV direct viral test such as PCR or P24 antigen. ☐

A positive viral culture result. ☐

A detectable HIV-viral load or viral resistance test result. ☐

Project AIDS Care Physicians Referrals ☐

No Documentation - Do not proceed, applicant is not eligible. ☐

Living in Florida: An applicant must be living in Florida. Photo ID is not required but encouraged. One form of documentation other than photo ID must be obtained.

☐ No: Do not proceed, applicant is not eligible. Yes: Check all applicable items below ☐

Drivers License ☐

Voters Registration ☐

Lease or Mortgage Statement ☐

Utility Bill ☐

Letter of Support ☐

Other: (specify) ☐

Screening for Other Programs: An applicant cannot be receiving services or be eligible to

4. Click within each field to enter the required information. You may also use the Tab key on the keyboard to move from one field to the next. To insert check marks, click inside the boxes. You may use Tab to move from one box to the next, pressing the keyboard's space bar to insert the check marks.

CAREWare Custom Form Designer

Form Add Brontosaurus, Betty > All Forms for Past 12 Months

F1 Save/Close
PgUp Previous Page
PgDn Next Page
Esc Back
Ctrl-Z Undo
Ctrl-Y Redo
Ctrl-P Print

☒ **State**

Eligibility Staff Assessment Worksheet

To be completed by eligibility staff to document applicant's eligibility status during enrollment.

Applicants Name Address

Name of Agency Address

Eligibility Staff Phone Number

Proof of HIV: An applicant must have documentation of a medical diagnosis of HIV disease. A laboratory test documenting confirmed HIV infection is required. Check the appropriate box.

A confirmed positive HIV antibody test result (Reactive EIA/ELISA screening test confirmed by Western Blot or Immunofluorescence Assay (IFA) or Nucleic Acid Testing (Aptima) by blood, oral fluid or urine. ☒

A positive HIV direct viral test such as PCR or P24 antigen. ☐

A positive viral culture result. ☐

A detectable HIV-viral load or viral resistance test result. ☐

Project AIDS Care Physicians Referrals ☐

No Documentation - Do not proceed, applicant is not eligible. ☐

Living in Florida: An applicant must be living in Florida. Photo ID is not required but encouraged. One form of documentation other than photo ID must be obtained.

☐ No: Do not proceed, applicant is not eligible. Yes: Check all applicable items below ☐

Drivers License ☐

Voters Registration ☐

Lease or Mortgage Statement ☐

Utility Bill ☐

Letter of Support ☐

Other: (specify) ☐

5. For fields requiring that a number or amount be specified, enter digits instead of words to indicate the numerical value. For example, if two adult household members are counted, enter the number **2** into the field.

The screenshot shows the CAREWare Custom Form Designer interface. The window title is "CAREWare Custom Form Designer". The top bar shows "Form Add" and "Brontosaurus, Betty > All Forms for Past 12 Months". On the left, there is a sidebar with keyboard shortcuts: F1 Save/Close, PgUp Previous Page, PgDn Next Page, Esc Back, Ctrl-Z Undo, Ctrl-Y Redo, and Ctrl-P Print. The main area displays a form titled "income: an applicant must have low income (FPL below 400%).". Below this, it says "Determining Financial Waiver for income - If an application has any of the following they may be waived for the income portion of the application with appropriate documentation. If yes, skip the next section." There are several checkboxes for Medicaid, Project AIDS Care, Food Stamps, SSI (Supplemental Security Income), TANF (Temporary Assistance for Needy Families), WIC (Women, Infant and Children), and Local Indigent Program. Below these is a text field for "Other (specify):". Then, it says "Determine Household Size: Applicant, Spouse and Dependent are always counted in the Household Size". There are three text fields: "How many adult household members are counted (including applicant):", "How many of the applicant's dependent children are in the home.", and "Total Household Size". A red arrow points to the first field, which contains the number "2". Below these fields, it says "Household Monthly Income: For applicants and COUNTED Household Members (HM) only." and "Determine the applicant's household income and the counted household members income named in the step above. If the applicant is unemployed, use additional paper to document responses to the applicable 'no income/unemployed' questions. Complete the list as either annually or monthly, but not mixed." There is a table with columns "Income", "Applicant", and "Counted Member". The rows are: Unemployed (with a checkbox), Employed (where), Self Employed, Checking Account, Savings Account, Investment income (Ex: rental properties), and Retirement Income (if accessed). Each row has input fields for the Applicant and Counted Member.

6. Entering words into numeric fields will result in an error message in the **Quality Check** screen.

The screenshot shows a "Quality Check" dialog box. The title bar says "Quality Check" and has a red "X" button. The main area contains the text "A valid number is required for customTextNumber2." and an "OK" button at the bottom right. A red arrow points to the "Quality Check" title bar.

7. To select the date the client is determined **Eligible** (or **Not Eligible**), click the **Date** drop-down menu.

CAREWare Custom Form Designer

Form Edit

Brontosaurus, Betty > Edit Eligibility Staff Assessment Worksheet

Child Support: 0

Other (specify):

Total Household Income: 15,669

Calculating the Federal Poverty Level: Using the most current FPL chart and the household size total, determine the \$ and FPL for the applicant. Calculate actual FPL instead of range. Use the total household income based on family size and divide by dollar amount in Column A of the FPL chart. You must use the annual income chart to arrive at the correct FPL. (See section 11 for calculating FPL)

Total Household Income: 15,669 Total FPL%: 101

The applicant meets the income requirements. ☒

The applicant does not meet the income requirement and is not eligible. ☐

Rights and Responsibilities: An applicant must be willing to cooperate with eligibility staff during the eligibility process and sign and comply with the Rights and Responsibilities established in the application. ☒

The applicant has initiated each requirement in the Application, provided the required signature and complied with the requirements during the eligibility process. ☒

Final Decision: Based on eligibility interview, application and required documentation the applicant is:

Eligible ☒ Not Eligible ☐ Date: 07/20/13

8. Use the left and right arrows (◀ and ▶) to scroll through the calendar by month/year. Click **Today** to select the current day, or click the correct date on the calendar.

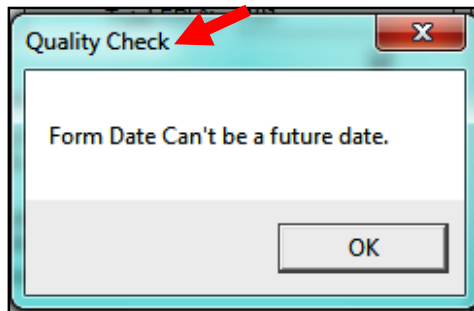
Date: 07/20/13

◀ July, 2013 ▶

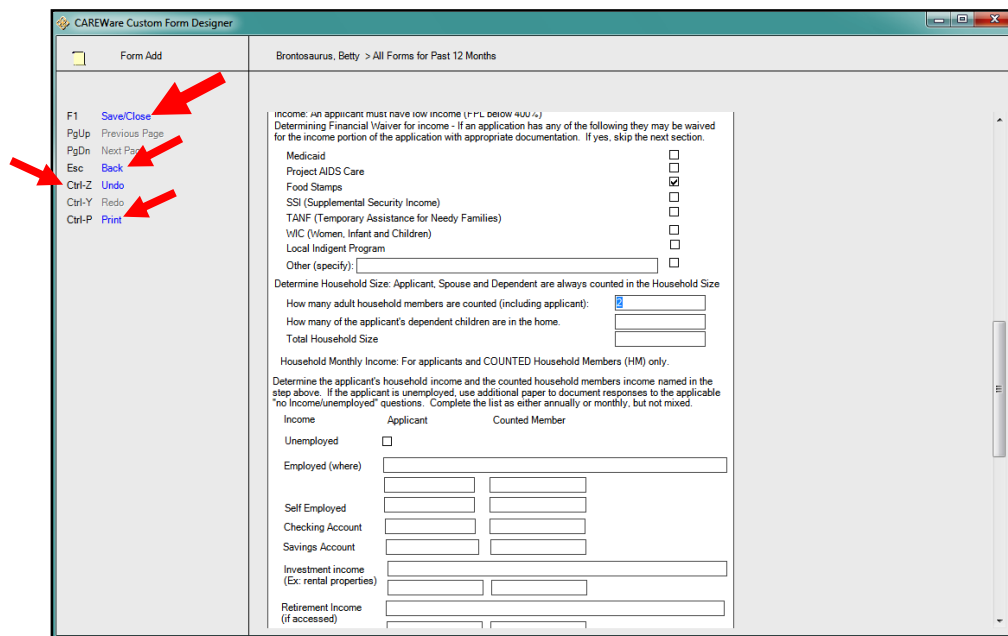
Su	Mo	Tu	We	Th	Fr	Sa
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

Today Clear

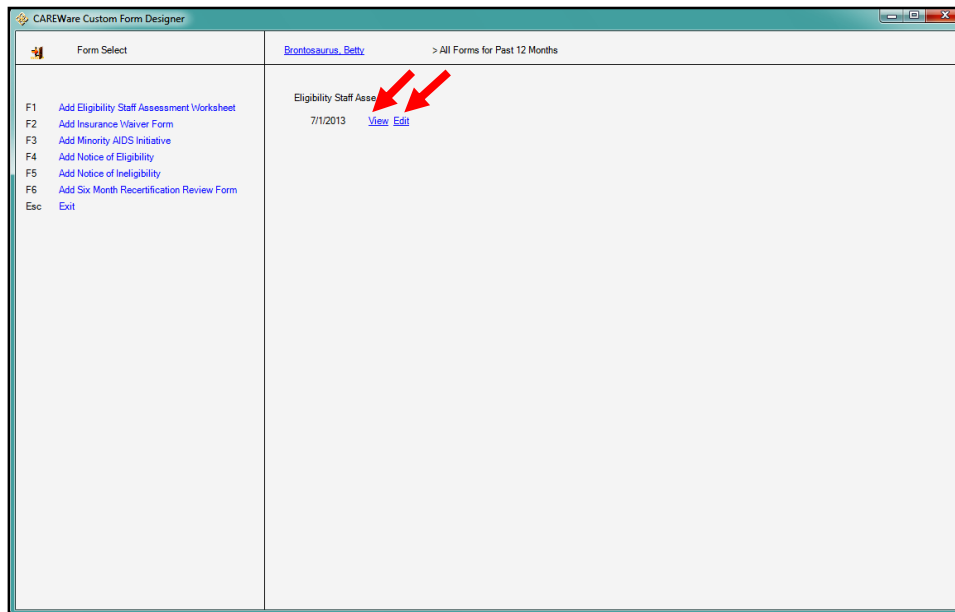
9. The form will not allow for future-dating. Only a current or past eligibility determination date may be saved.



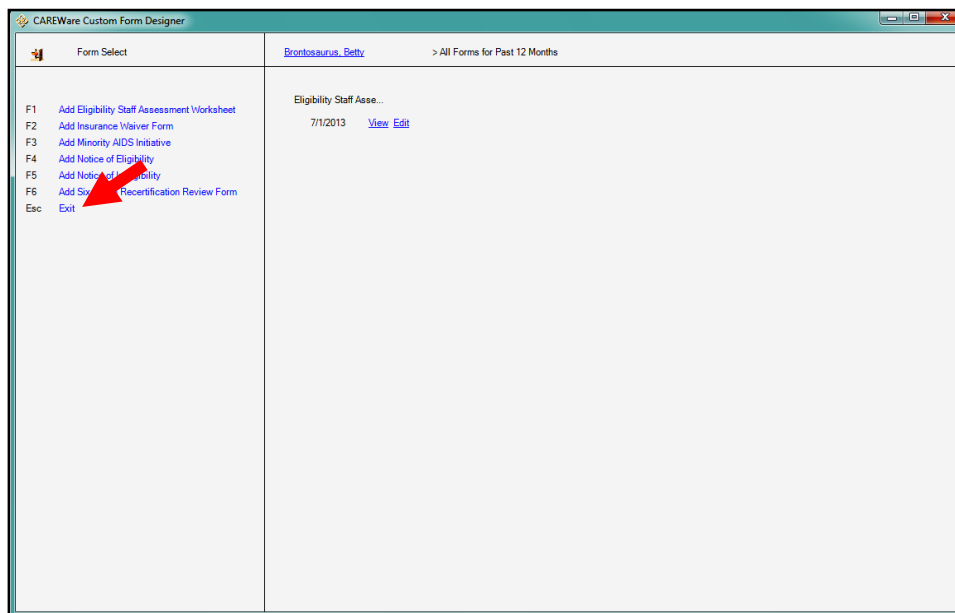
10. Once information has been entered into all fields and the date has been selected, click the **Save/Close** hyperlink or press F1 on the keyboard to save the completed form. The other menu hyperlinks may be selected to go **Back**, to **Undo** the last action, or to **Print** the form at any point during the completion of the form, if needed.



11. After clicking **Save/Close**, links to the completed form will appear on the screen. Click **View** to examine the form or **Edit** to make changes.



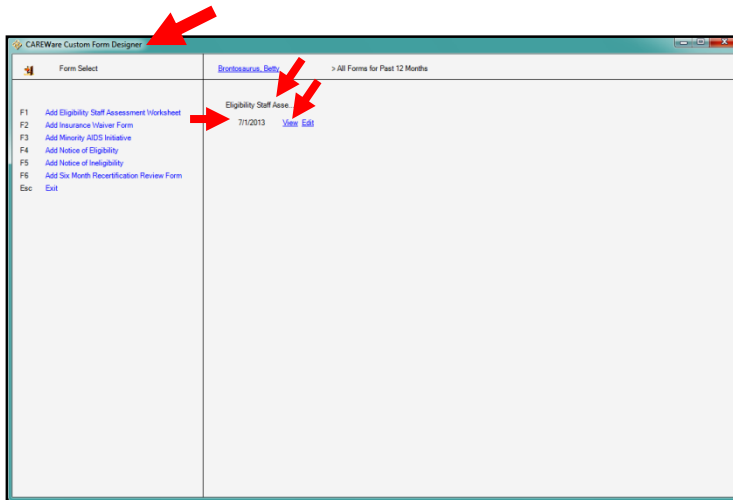
12. Follow the previous steps to select, complete and save other forms listed under the **Forms Select** menu.
13. Click **Exit** or the keyboard's Esc key to exit the **CAREWare Custom Form Designer** screen.



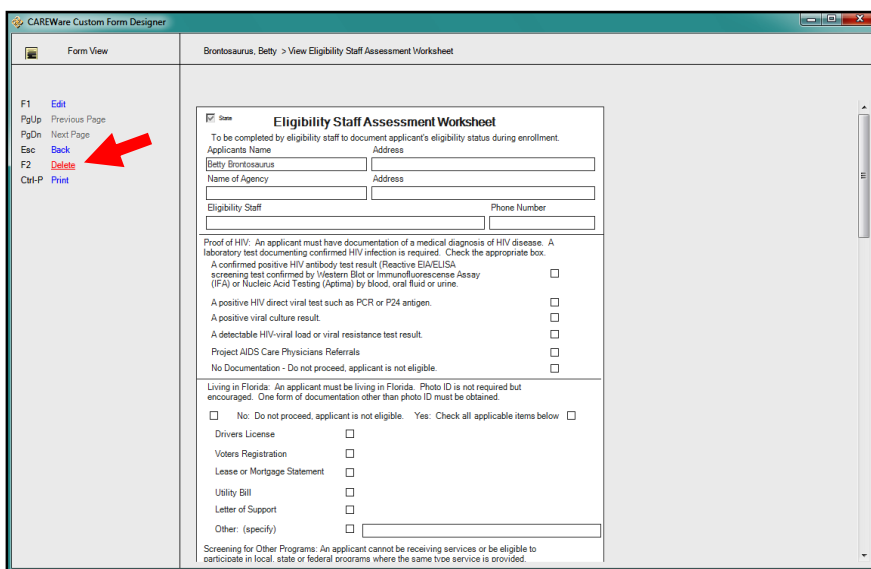
Deleting Forms

Although forms completed under the **Forms** tab can be deleted, forms should not be deleted unless one is completed for the wrong client, under a different client's name, or other unusual circumstance. Forms will save by date and should be kept for tracking and auditing purposes.

1. To delete a saved form, locate the form on the **CAREWare Custom Form Designer** screen by name and/or date of entry. Click **View**.



2. Click the **Delete** hyperlink or use the keyboard's F2 key to remove the form. No warning screen or confirmation window will appear to verify that you want to delete, so be sure you are ready to remove the form before pressing **Delete** or F2. The form will be completely removed.



Part 18 – Attachments

Scanning Documents

The following items **MUST** be scanned into state CAREWare as proof of documentation. See the *Eligibility Procedures Manual* for acceptable proof/documents, as well as requirements for scanning at initial application and six month recertification.

1. Proof of HIV
2. Proof of living in Florida
3. Proof of income
4. Proof of any third party insurance (for example, Medicaid, Medicare, private insurance or Veterans Benefits)
5. Copy of the **signed** application (both sides)
6. Copy of the **signed** Notice of Eligibility
7. Copy of the Insurance Waiver Form (if applicable)
8. Copy of the **signed** releases/consent forms
9. Other identified documents as part of file (if applicable)

Saving Scanned Documents

Scanned documents attached in the state CAREWare **MUST** be deleted from networks or desktop computers routinely, at least at the end of each day.

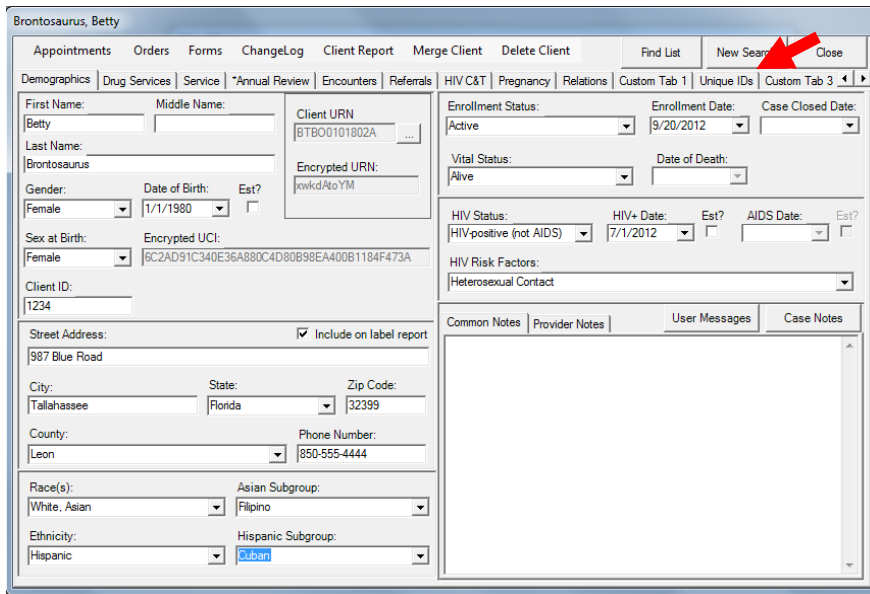
Agencies should determine a central location where all scanned documents are stored. It is preferable that all documents be scanned to one file/location and then be deleted each night for security purposes.

NOTE: File uploads (scanning) are limited to 1 MB or smaller. Anything larger will cause problems with the system.

Attaching Scanned Documents

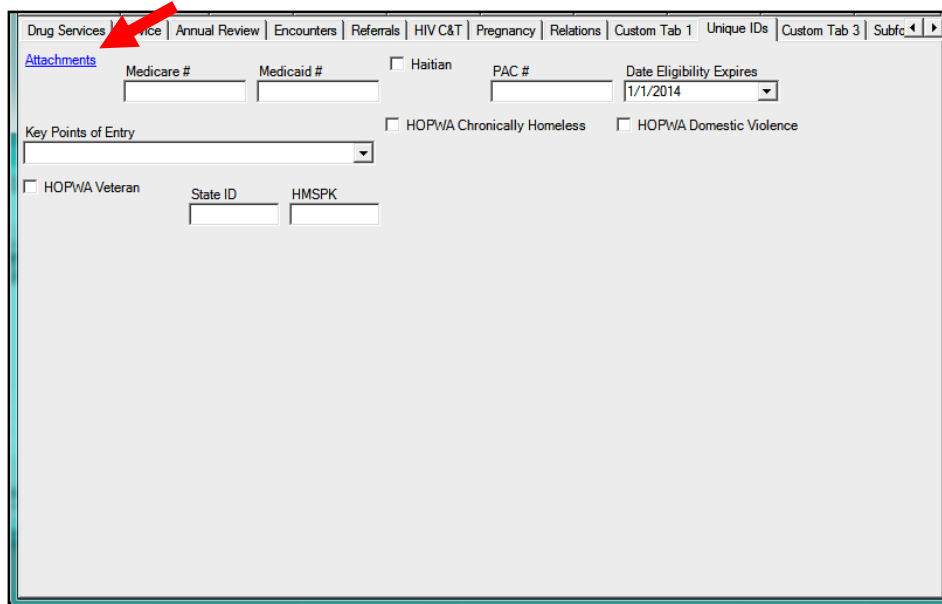
Citrix users—see additional steps subsection.

1. Select the **Unique IDs** tab.



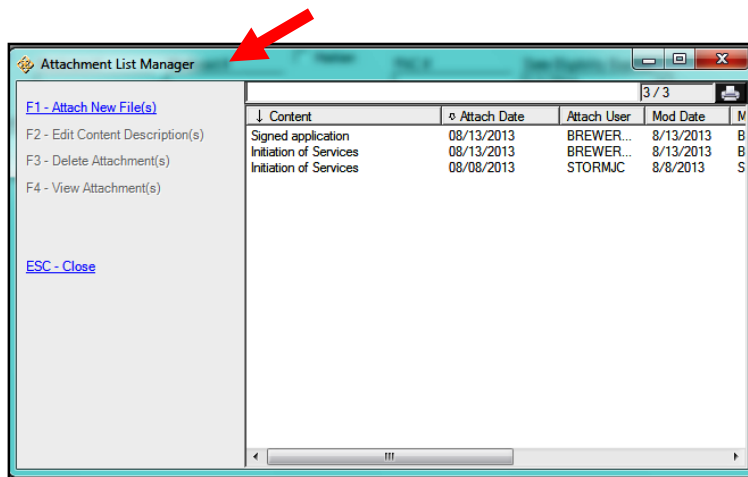
The screenshot shows a client record for "Brontosaurus, Betty". The "Unique IDs" tab is selected in the top navigation bar. The form contains various fields for client information, including First Name, Middle Name, Last Name, Gender, Date of Birth, Client URN, Encrypted URN, Enrollment Status, Enrollment Date, Case Closed Date, Vital Status, Date of Death, HIV Status, HIV+ Date, AIDS Date, HIV Risk Factors, Street Address, City, State, Zip Code, County, Phone Number, Race(s), Asian Subgroup, Ethnicity, and Hispanic Subgroup. A red arrow points to the "Unique IDs" tab in the top navigation bar.

2. Click the **Attachments** hyperlink.

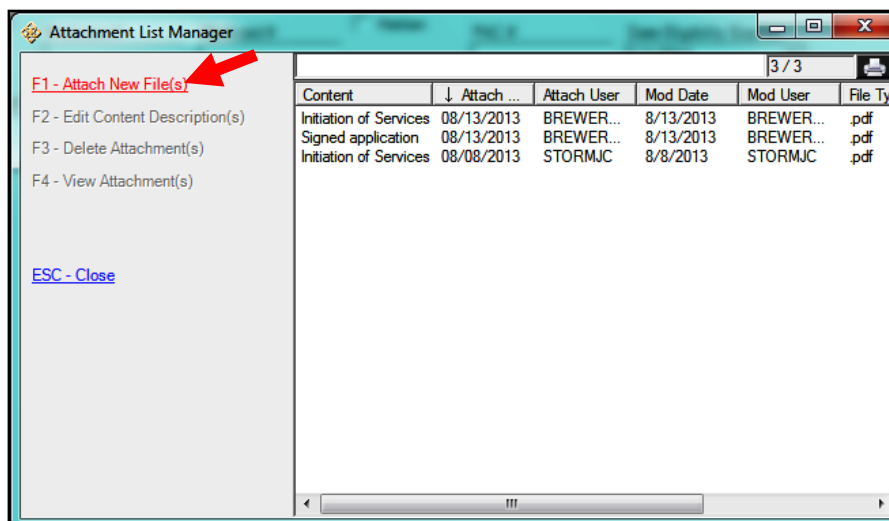


The screenshot shows the "Attachments" tab selected in the top navigation bar. The form contains fields for Medicare #, Medicaid #, PAC #, Date Eligibility Expires, Key Points of Entry, HOPWA Chronically Homeless, HOPWA Domestic Violence, HOPWA Veteran, State ID, and HMSPK. A red arrow points to the "Attachments" tab in the top navigation bar.

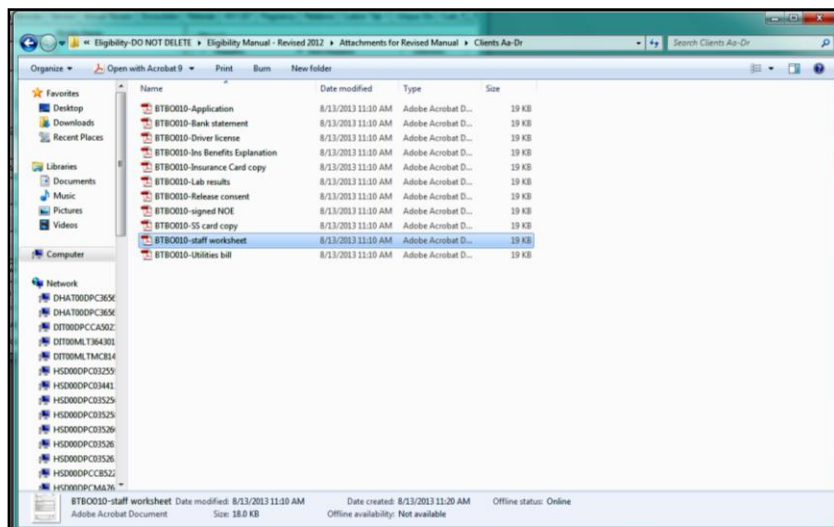
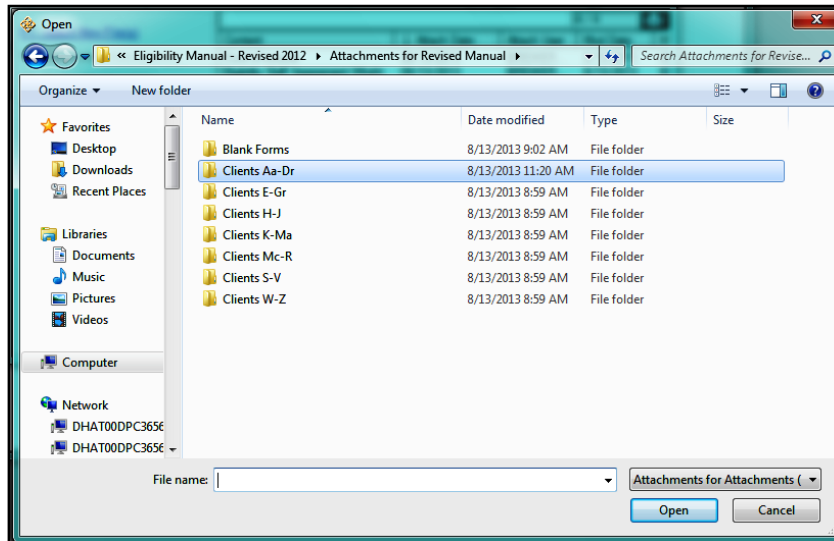
3. If documents have previously been added for the client, they will appear on the **Attachment List Manager** screen.



4. To upload a new file, click **F1 - Attach New File(s)** or press the F1 key.



5. Go to the central location where the scanned document is stored. Open the folder and select the document to be uploaded into CAREWare. The screens below are examples of how scanned documents may be temporarily stored.



6. Once you have selected a file to upload, the **Attachment Properties** screen will appear. Select a **Content Type** from the drop-down menu. You must choose an available content type because you are not able to type free-text in the drop-down menu.

Attachment Properties

File Name:
BTBO010-staff worksheet.pdf

Content Type:
Eligibility Staff Assessment Wksht
Income waiver
Initiation of Services
Miami Initial Packet
Other Eligible Funding Form
Photo ID
Plan of Care
Proof of 3rd party insurance

Save

7. Specifics about the document can be noted in the **Comments** field, which will appear on the **Attachment Properties** screen once the **Content Type** has been selected from the menu. **Save** entries.

Attachment Properties

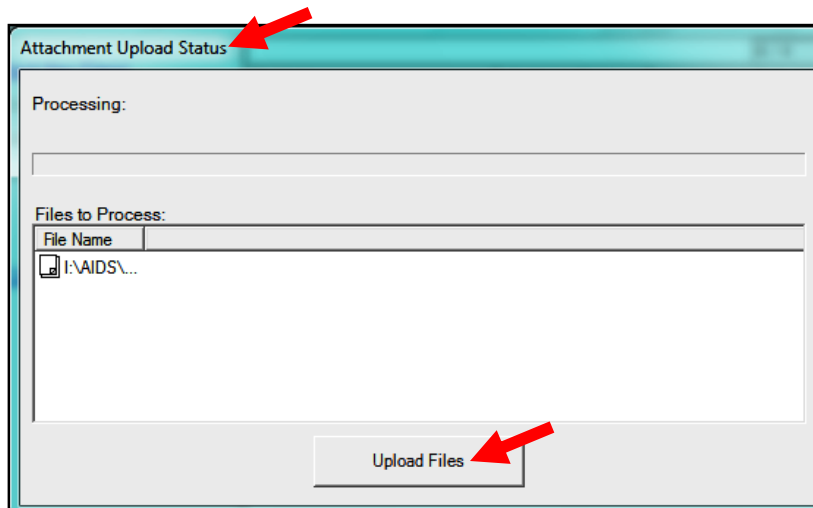
File Name:
BTBO010-staff worksheet.pdf

Content Type:
Eligibility Staff Assessment Wksht

Comments:

Save

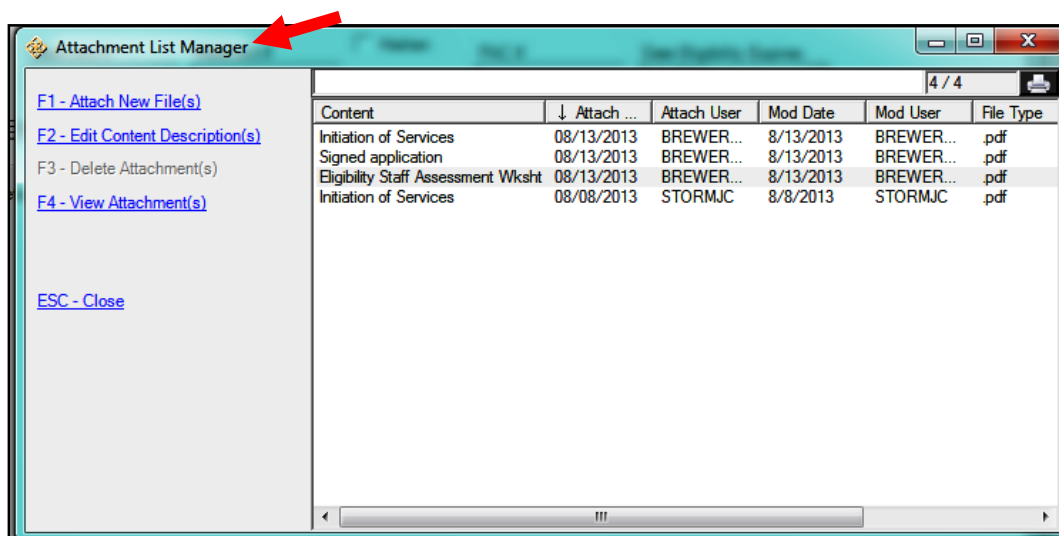
8. The **Attachment Upload Status** screen will appear. Click the **Upload Files** button.



The screenshot shows the 'Attachment Upload Status' window. It has a title bar with the text 'Attachment Upload Status'. Below the title bar is a section labeled 'Processing:' with an empty text area. Below that is a section labeled 'Files to Process:' with a table. The table has one column labeled 'File Name' and one row containing the text 'I:\AIDS\...'. At the bottom right of the window is a button labeled 'Upload Files'. Two red arrows point to the title bar and the 'Upload Files' button.

File Name
I:\AIDS\...

9. The attached document should now appear in the **Attachment List Manager** screen.

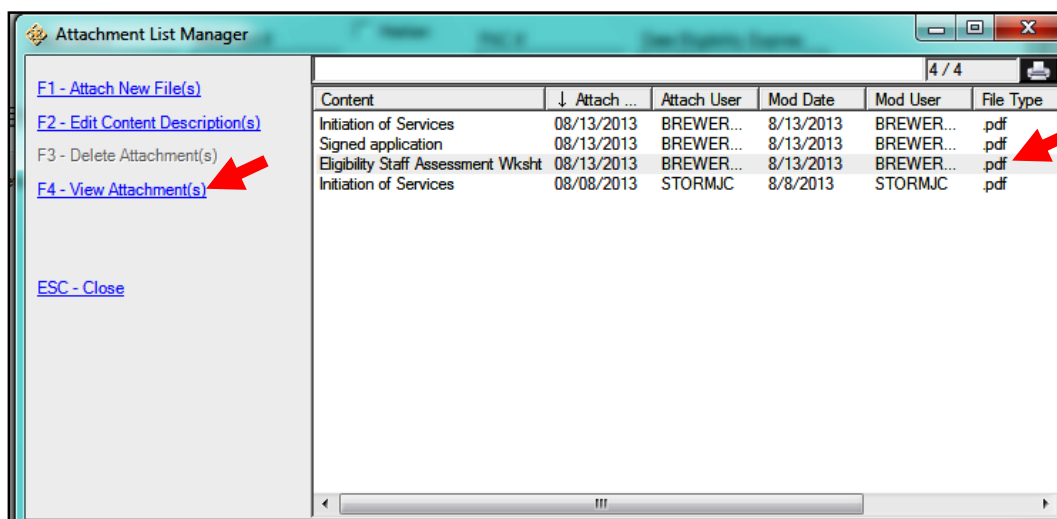


The screenshot shows the 'Attachment List Manager' window. It has a title bar with the text 'Attachment List Manager'. On the left side, there is a sidebar with the following links: 'F1 - Attach New File(s)', 'F2 - Edit Content Description(s)', 'F3 - Delete Attachment(s)', 'F4 - View Attachment(s)', and 'ESC - Close'. The main area contains a table with the following data:

Content	↓ Attach ...	Attach User	Mod Date	Mod User	File Type
Initiation of Services	08/13/2013	BREWER...	8/13/2013	BREWER...	.pdf
Signed application	08/13/2013	BREWER...	8/13/2013	BREWER...	.pdf
Eligibility Staff Assessment Wksht	08/13/2013	BREWER...	8/13/2013	BREWER...	.pdf
Initiation of Services	08/08/2013	STORMJC	8/8/2013	STORMJC	.pdf

At the bottom right of the table, there is a page indicator '4 / 4' and a print icon. A red arrow points to the title bar.

10. Once a document has been uploaded, you must verify the upload occurred without error. Highlight the uploaded document and select **F4 - View Attachment(s)** or press the F4 key.



11. If the document opens, the upload occurred properly and you can continue with your data entry. A corrupted file will not open. If the file does not open, have your local provider administrator delete the file from CAREWare and attempt the upload again. This check MUST be done for every document you upload.

Citrix Users Additional Steps

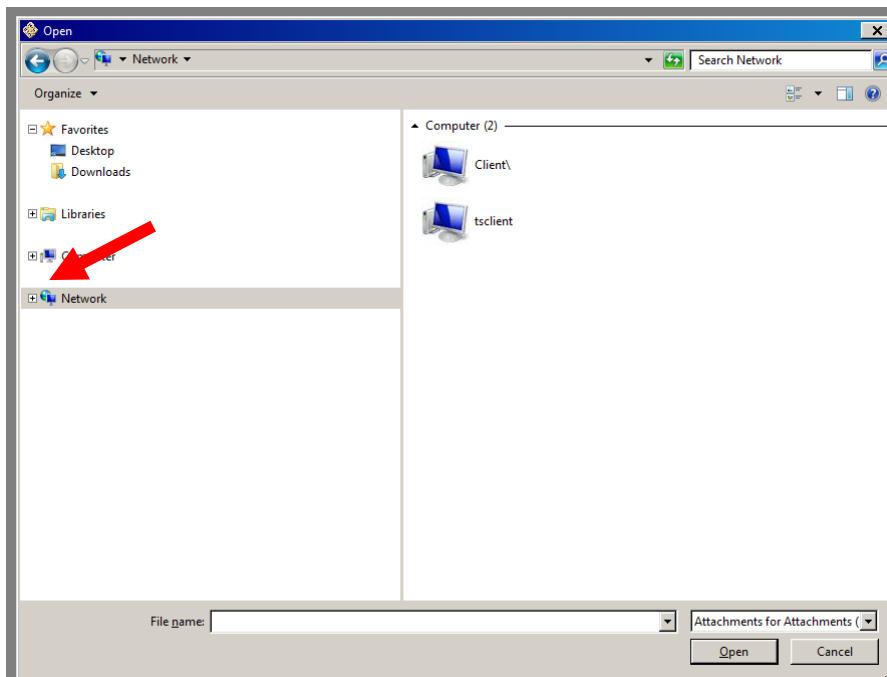
Citrix users must map the drive to where they store their client files for uploads through the Citrix server. Once the drive is mapped, the server will remember the settings and open to that same location when **F1 - Attach New File(s)** is selected.

NOTE: The HIV/AIDS Section uses multiple Citrix servers to provide CAREWare access to private agency staff. Each server can accommodate a limited number of users. Therefore, each server must be mapped by following the steps below. The users do not have the ability to pick through which server they access CAREWare—the system automatically makes that choice. Two indicators that will tell you the server needs mapping are:

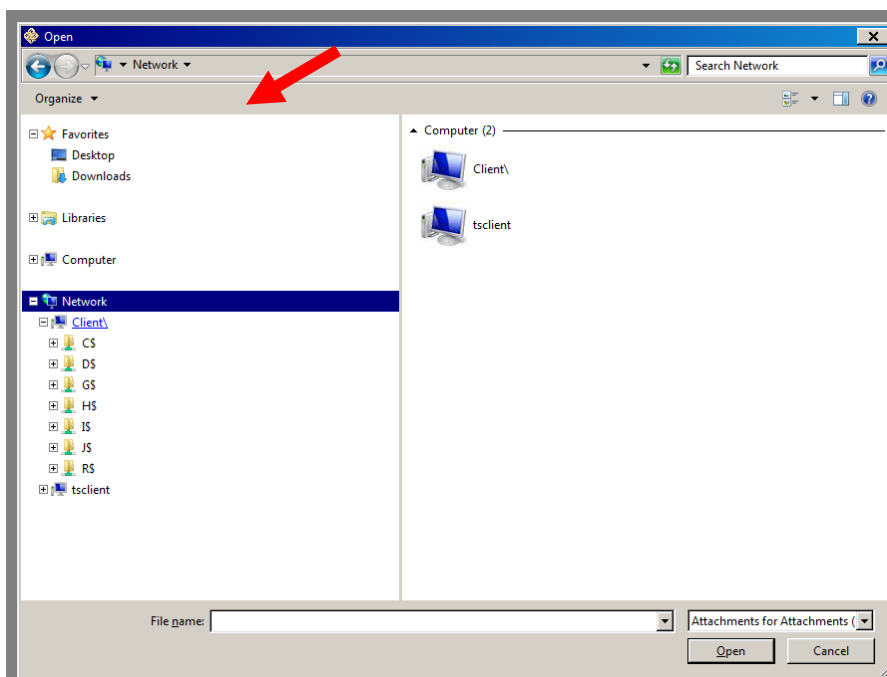
1. When selecting **F1 - Attach New File(s)**, the pop-up screen that appears does not open to the location where the scanned documents are temporarily stored.
2. After uploading a file, clicking on **F4 - View Attachment(s)** does not open the document.

If you experience either one of these indicators, try mapping the server.

1. Select the “+” sign in front of **Network**.

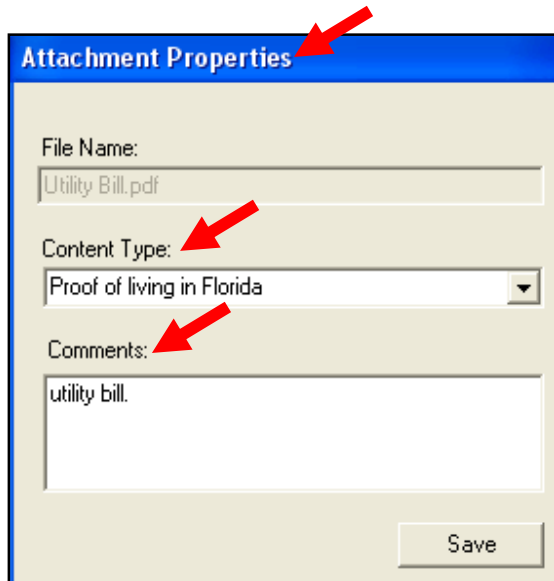


2. At this screen you will see a number of drives that end with a “\$.” This is your network. From here, navigate to the location where you are storing the clients’ files to upload. Only after a document has been successfully uploaded is the drive mapped.



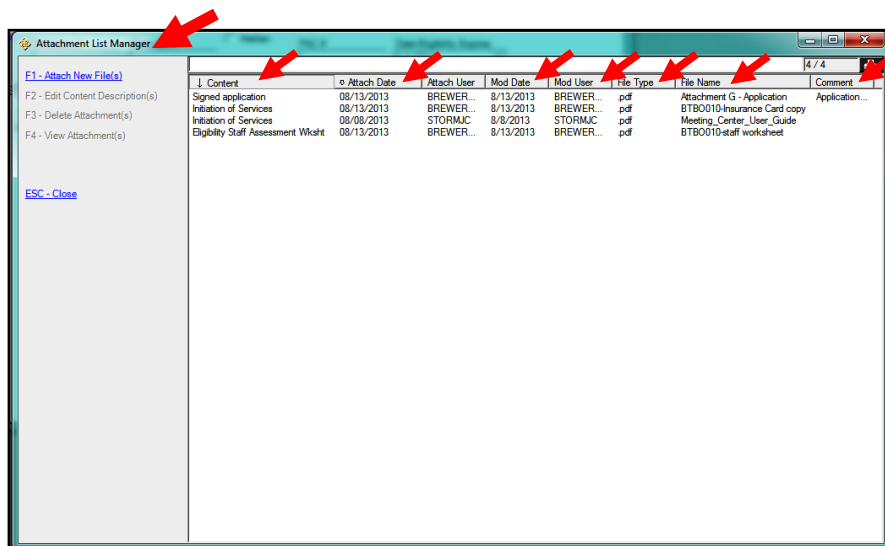
Attachment Rules and Sorting

1. All documents should be saved individually rather than combined into one PDF file, even if they represent one category. For example, a copy of a client's utility bill may be used as proof of living in Florida. Upload the scanned utility bill by selecting **Proof of living in Florida** from the **Content Type** drop-down menu on the **Attachment Properties** screen. In the **Comments** field, type **utility bill**. Upload the driver's license separately and select **Proof of living in Florida** again as the **Content Type**.



The **Attachment Properties** dialog box is shown. It has a blue title bar. Inside, there are three main sections: **File Name:** with a text box containing "Utility Bill.pdf"; **Content Type:** with a dropdown menu showing "Proof of living in Florida"; and **Comments:** with a text box containing "utility bill.". A **Save** button is at the bottom right. Red arrows point to the title bar, the File Name text box, the Content Type dropdown, and the Comments text box.

2. Attachments may be sorted by clicking any of the column headings—**Content**, **Attach Date**, **Attach User**, **Mod Date**, **Mod User**, **File Type**, **File Name** or **Comment**—from the **Attachment List Manager** screen.

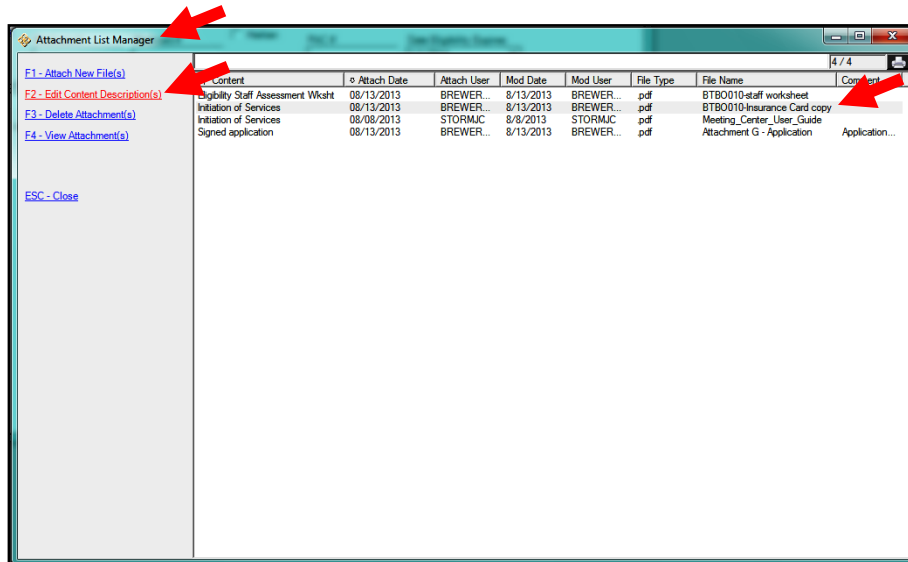


The **Attachment List Manager** window is shown. It has a title bar and a menu bar. On the left is a sidebar with options: **F1 - Attach New File(s)**, **F2 - Edit Content Description(s)**, **F3 - Delete Attachment(s)**, **F4 - View Attachment(s)**, and **ESC - Close**. The main area is a table with columns: **Content**, **Attach Date**, **Attach User**, **Mod Date**, **Mod User**, **File Type**, **File Name**, and **Comment**. Red arrows point to each of these column headers. The table contains three rows of data.

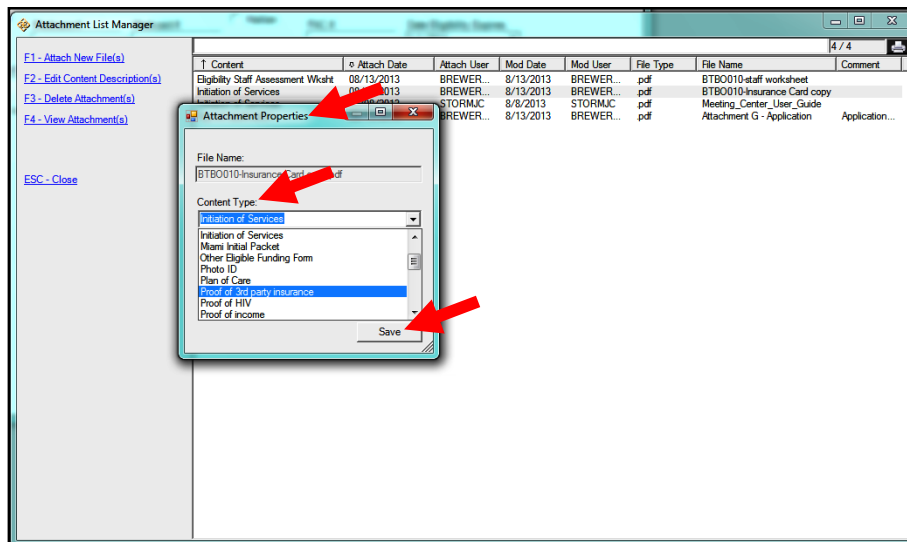
Content	Attach Date	Attach User	Mod Date	Mod User	File Type	File Name	Comment
Signed application	08/13/2013	BREWER...	8/13/2013	BREWER...	pdf	Attachment G - Application	Application...
Initiation of Services	08/13/2013	BREWER...	8/13/2013	BREWER...	pdf	BTB0010-Insurance Card copy	
Eligibility Staff Assessment Worksheet	08/08/2013	STORMAJC	8/9/2013	STORMAJC	pdf	Meeting_Center_User_Guide	

Editing Content Description

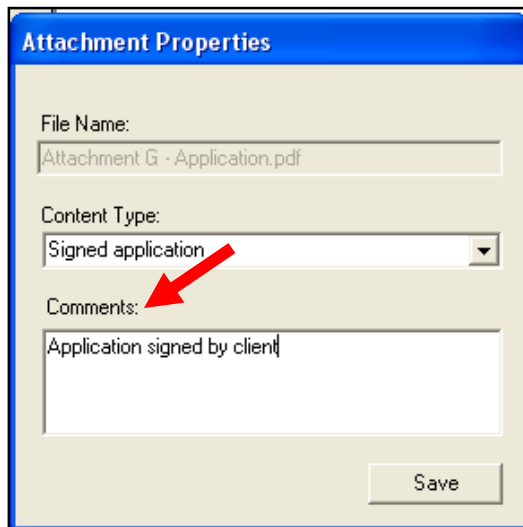
1. To edit the document's description, from the **Attachment List Manager** screen, select one of the listed documents. Click **F2 - Edit Content Description(s)** or press the F2 key.



2. Select the appropriate **Content Type** from the drop-down menu on the **Attachment Properties** screen and click **Save**.



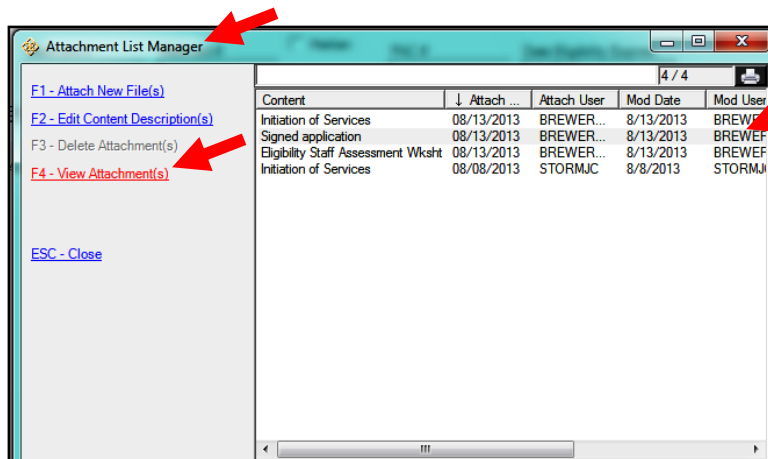
3. You may also add/edit/delete the **Comments** field.



The 'Attachment Properties' dialog box has a blue title bar. It contains three main sections: 'File Name' with a text field containing 'Attachment G - Application.pdf'; 'Content Type' with a dropdown menu set to 'Signed application'; and 'Comments' with a text area containing 'Application signed by client'. A red arrow points to the 'Comments' label. At the bottom right is a 'Save' button.

Viewing Attachments

1. To view an attachment, from the **Attachment List Manager** screen, select one of the listed documents. Click **F4 - View Attachment(s)** or press the F4 key.



The 'Attachment List Manager' window has a teal title bar. On the left is a sidebar with menu items: 'F1 - Attach New File(s)', 'F2 - Edit Content Description(s)', 'F3 - Delete Attachment(s)', 'F4 - View Attachment(s)', and 'ESC - Close'. A red arrow points to the 'F4 - View Attachment(s)' item. The main area is a table with 5 columns: 'Content', 'Attach ...', 'Attach User', 'Mod Date', and 'Mod User'. A red arrow points to the 'Mod User' column header. The table contains four rows of data.

Content	Attach ...	Attach User	Mod Date	Mod User
Initiation of Services	08/13/2013	BREWER...	8/13/2013	BREWER...
Signed application	08/13/2013	BREWER...	8/13/2013	BREWER...
Eligibility Staff Assessment Wksht	08/13/2013	BREWER...	8/13/2013	BREWER...
Initiation of Services	08/08/2013	STORMJC	8/8/2013	STORMJC

2. The selected document will appear. In the example below, it is a signed application.

The image shows two overlapping windows. The left window is Adobe Acrobat Pro displaying a PDF form titled "Application to Receive Allowable Services for HIV/AIDS Patient Care Programs". The form is divided into two parts: "Part 1 Applicant Information" and "Part 2 Living Arrangements".

Part 1 Applicant Information

HIV positive is an eligibility requirement.
Check if you are HIV Positive: ☐ Yes ☐ No (Upload a copy of an HIV Laboratory Test which shows your HIV status)

Name: _____

Sex: ☐ Male ☐ Female ☐ Transgender SSN: _____

Date of Birth: MM / DD / Year _____

Race: _____ Ethnicity: _____ Language Spoken: _____

Are you a Veteran? ☐ Yes ☐ No How you earned in the armed forces? ☐ Yes ☐ No

Are you pregnant? ☐ Yes ☐ No I Don't Know

Do you have a housing need? ☐ Yes ☐ No

Do you rent? ☐ Yes ☐ No Monthly Payment \$: _____

Do you own your own house? ☐ Yes ☐ No Monthly Payment \$: _____

When were you first diagnosed with HIV? _____ Mode of transmission: _____

Part 2 Living Arrangements

Address where you currently live:

Street Address: _____

City: _____ State: _____ Zip: _____ County: _____

Mailing address (if different)

Street Address: _____

City: _____ State: _____ Zip: _____ County: _____

Telephone: () - - - - - () - - - - -

Home Work Other Contact

Email: _____

How many adults live with you? _____ How many children live with you? _____ (under 18 years of age)

Check how you prefer staff to contact you.

☐ Home Phone ☐ Work Phone ☐ Other Contact Phone ☐ Employment Phone ☐ Mail ☐ Other _____

The right window is a software interface with a menu bar (Forms, Change Log, Client Report, Merge Client, Delete Client, Find List, New Search, Close) and a toolbar. It features a "Manager" tab and a table with the following data:

Content	1 Attach	Attach User	Mod Date	Mod User
Initiation of Services	08/13/2013	BREWER...	8/13/2013	BREWER...
Eligibility Staff Assessment Waiver	08/13/2013	BREWER...	8/13/2013	BREWER...
Signed application	08/13/2013	BREWER...	8/13/2013	BREWER...
Initiation of Services	08/08/2013	STORMAJC	8/8/2013	STORMAJC

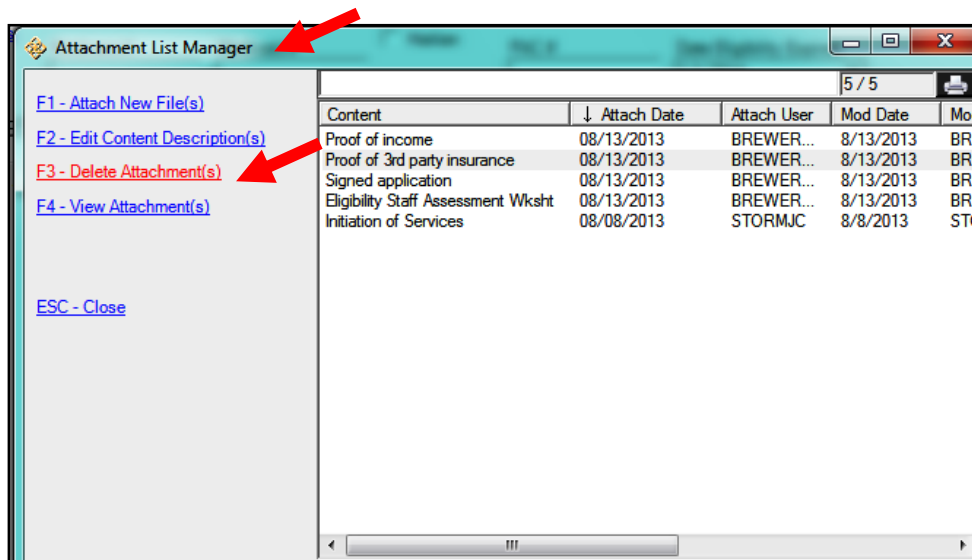
C. Deleting Attachments—for Local Provider CAREWare Administrators ONLY

Documents scanned and saved as attachments under the **Unique IDs** tab should not be deleted, except under the following circumstances:

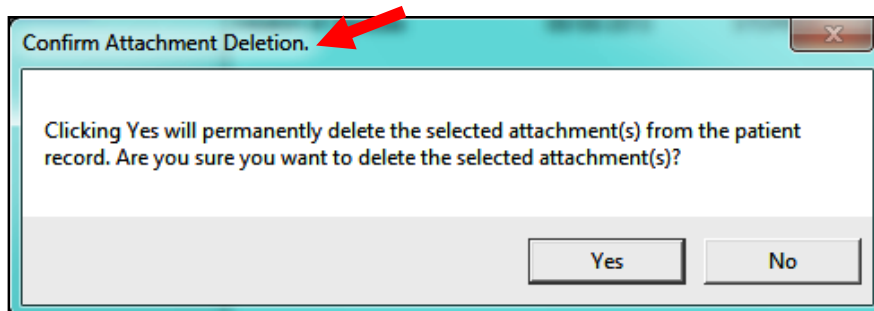
- The document is scanned under the wrong client's name.
- The wrong type of document was scanned by accident.

Deletion of attachments are not allowed at the user level. Documents needing deletion will require a call to the local CAREWare administrator at each agency or program office. Local CAREWare administrators have access privileges to the Delete function and can assist local staff. For questions on access privileges, contact the Help Desk at (850) 922-7599.

1. Administrators: To delete an attachment, from the **Attachment List Manager** screen, click on the document to be deleted. Click **Delete Attachment(s)** or press the F3 key.



2. A message will appear warning the administrator that clicking **Yes** will permanently delete the selected attachment. Click **Yes** or **No**.



Part 19 – Housing Opportunities for Persons with AIDS

A. Enrolling a New Client

Most Housing Opportunities for Persons with AIDS (HOPWA) clients are already in the system because they are receiving Ryan White services or have received HOPWA services in the past. For new clients, you must ensure the client meets enrollment qualifications for services as well as program eligibility for HOPWA.

For HOPWA only, please ensure that you enter HOPWA data on the following tabs.

1. **Unique ID Tab:** Click on the appropriate boxes as it relates to the client. If not applicable, leave blank. Options are **HOPWA Chronically Homeless**, **HOPWA Domestic Violence**, or **HOPWA Veteran**.

The screenshot shows the 'Unique IDs' tab in a software interface. At the top, there are tabs for 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Merge Client', 'Delete Client', 'Find List', 'New Search', and 'Close'. Below these are sub-tabs: 'Service', 'Annual Review', 'Encounters', 'Referrals', 'HIV C&T', 'Relations', 'Unique IDs' (selected), 'Non-RW Housing Case Management', 'Custom Tab 3', 'Subform', and 'Pharmacy'. The main area contains fields for 'Medicaid #' (8217721904), 'Medicare #' (with a red arrow pointing to it), 'PAC #', 'Social Security #' (211-9881), and a 'Haitian' checkbox. Below these are three checkboxes: 'HOPWA Chronically Homeless', 'HOPWA Domestic Violence', and 'HOPWA Veteran' (with a red arrow pointing to it). There is also a 'Date Eligibility Expires' dropdown and 'Key Points of Entry' and 'Part B Medical Case Manager' dropdowns.

2. Under the **Subform** tab, if the client you are enrolling has beneficiaries, you will enter them under the **HOPWA Household Beneficiaries** tab. All information entered here pertains to the beneficiary, not the client. Click on **Add Row** and add as many rows as there are beneficiaries.

The screenshot shows the 'HOPWA (Household Beneficiaries)' tab. At the top, there are tabs for 'Appointments', 'Orders', 'Forms', 'ChangeLog', 'Client Report', 'Merge Client', 'Delete Client', 'Find List', 'New Search', and 'Close'. Below these are sub-tabs: 'Service', 'Annual Review', 'Encounters', 'Referrals', 'HIV C&T', 'Relations', 'Unique IDs', 'Non-RW Housing Case Management', 'Custom Tab 3', 'Subform' (selected), and 'Pharmacy'. The main area has a 'State' dropdown set to 'HOPWA (Household Beneficiaries)' and an 'Edit Page' button. Below this is a table with columns: 'Entry Date', 'Name', 'Race', 'Hispanic', 'HOPWA D...', 'HOPWA G...', 'HOPWA B...', 'Notes', and 'Domain'. The table is currently empty. At the bottom right, there are buttons for 'Sharing', 'Add Row' (with a red arrow pointing to it), 'Edit Row', and 'Delete Row'.

The **Edit Page** tab screen will appear.

- a. **Entry Date** is the current date
- b. Enter **Name**
- c. Select **Race**
- d. Check **Hispanic** if client identifies as Hispanic
- e. Select **HOPWA D.O.B.** (date of birth)
- f. Select **HOPWA Gender**; **Female** or **Male** are the only options available
- g. **HOPWA Beneficiary Inactive Date** is used only when you know a beneficiary is no longer considered a beneficiary. The CAREWare system will no longer count the individual as a client beneficiary.
- h. Indicate whether beneficiary is HIV positive by clicking the “HIV Positive” box.
- i. You may enter **Notes** relevant to the beneficiary in this field.
- j. **Save** entries.

The screenshot shows the 'Edit Page' tab for 'HOPWA (Household Beneficiaries)'. The form contains the following fields and controls:

- Entry Date**: A date picker.
- Name**: A text input field.
- Race**: A dropdown menu.
- Hispanic**: A checkbox.
- HOPWA D.O.B.**: A date picker.
- HOPWA Gender**: A dropdown menu.
- HOPWA Beneficiary Inactive Date**: A date picker.
- Notes**: A large text area for additional information.
- Save** and **Cancel**: Buttons at the bottom right.

B. HOPWA Service Entry

Most HOPWA clients need an enrollment service entered in CAREWare when services are initiated. The core HOPWA services that have enrollment, update and exit services associated with them are:

- **STRMU** – Short term rent, mortgage and utilities assistance paid on a participant's behalf in order to prevent homelessness as an intervention to help a household maintain their current housing

- **TBRA** – Tenant-based rental assistance is a rental subsidy used to help participants obtain permanent housing in the private housing market that meets housing quality standards and is rent-reasonable
- **Transitional/Short Term Supportive Services** - HOPWA Transitional/Short Term Supportive services are designed to assist clients with transitioning from homelessness to more stable housing. Funds typically pay for hotel and motel stays.

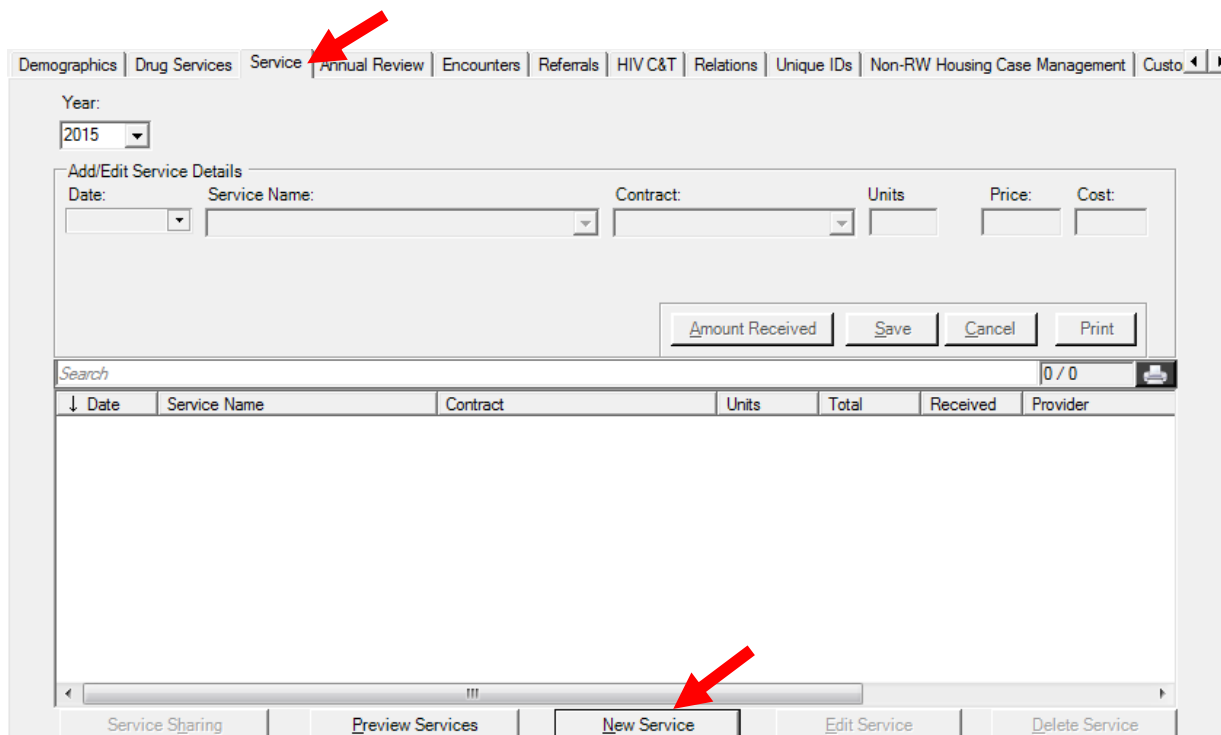
The following **HOPWA Supportive Services** do not require an enrollment, update or exit service in CAREWare.

- Permanent Housing Placement Assistance
- Case Management
- Housing Information Services

HOPWA STRMU Enrollment

All STRMU clients should receive a STRMU Enrollment Service at the beginning of each fiscal year (July 1st).

1. From the Service tab, click on the New Service button.



The screenshot shows the CAREWare interface with the 'Service' tab selected. A red arrow points to the 'Service' tab. Below the tabs, there is a 'Year:' dropdown set to '2015'. The 'Add/Edit Service Details' section includes fields for 'Date:', 'Service Name:', 'Contract:', 'Units', 'Price:', and 'Cost:'. Below these fields are buttons for 'Amount Received', 'Save', 'Cancel', and 'Print'. A search bar is located below the details section. At the bottom of the interface, there is a row of buttons: 'Service Sharing', 'Preview Services', 'New Service', 'Edit Service', and 'Delete Service'. A red arrow points to the 'New Service' button.

↓ Date	Service Name	Contract	Units	Total	Received	Provider

2. On the screen that appears, complete the following:
 - a. **Date** authorized by provider; that is, the date service provided to client, which is not always the current date.
 - b. **Service Name**:
 - i. **H STRMU Enrollment** — this will always be the first entry after the start of new contract year;
 - ii. For existing clients that need to be re-enrolled and receive a service on the same day, record the service in the **HOPWASvcType** drop down box
 - c. **Contract**; CAREWare will populate this drop down menu automatically with the contracts linked to the service and/or subservice
 - d. **Units**; count units as one unit per transaction. For example, if paying 21 days of rent at \$250/month, enter 1 unit with a cost of \$250.00 (see example below).
 - e. **Price**; the price per unit. Cost will automatically calculate from the number of **Units** times the **Cost**.

The screenshot shows the 'Add/Edit Service Details' form. At the top, there is a navigation bar with tabs: Demographics, Drug Services, Service, Annual Review, Encounters, Referrals, HIV C&T, Relations, Unique IDs, Non-RW Housing Case Management, and Custom. Below the navigation bar, the 'Year' is set to 2015. The 'Add/Edit Service Details' section contains the following fields:

- Date:** 6/17/2015 (indicated by a red arrow)
- Service Name:** H STRMU Enrollment (indicated by a red arrow)
- Contract:** HOPWA 1415 (indicated by a red arrow)
- Units:** 1
- Price:** \$0.00
- Cost:** \$0.00

Below these fields are several checkboxes and dropdown menus:

- ☐ Total Hours
- ☐ Had Contact with Primary Health Provider
- ☐ Has accessed Insurance or Assistance
- ☐ Has Consistent Case Management Contact
- ☐ Has Housing Plan
- ☐ Obtained income producing job from HOPWA effort
- Percent Median Income:** (dropdown menu)
- Pre-Enrollment Housing Situation:** (dropdown menu)
- ☐ Qualified Sources of Income
- HOPWASvcType:** (dropdown menu)
- Service Comment:** (text area)

At the bottom right, there are four buttons: Amount Received, Save, Cancel, and Print.

Example:

The screenshot shows the 'Add/Edit Service Details' form. At the top, there is a navigation bar with tabs: Demographics, Drug Services, Service, Annual Review, Encounters, Referrals, HIV C&T, Relations, Unique IDs, Custom Tab 2, Custom Tab 3, and Service. Below the navigation bar, the 'Year' is set to 2012. The 'Add/Edit Service Details' section contains the following fields:

- Date:** 1/1/2012
- Service Name:** H STRMU Enrollment
- Contract:** RICHES HUD
- Units:** 1
- Price:** \$250.00 (indicated by a red arrow)
- Cost:** \$250.00 (indicated by a red arrow)

At the bottom right, there are four buttons: Amount Received, Save, Cancel, and Print.

3. Enter assessment information as it relates to the client at the time of enrollment. Click on the following options if they pertain to the client:
 - a. **Had Contact with Primary Health Provider**
 - b. **Has Housing Plan**; all HOPWA clients must have a housing plan
 - c. **Has accessed Insurance or assistance**
 - d. **Obtained income producing job from HOPWA effort**
 - e. **Has Consistent Case Management Contact**

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Unique IDs | Custom Tab 2 | Chart Number | < | >

Year: 2015

Add/Edit Service Details

Date: 6/17/2015 Service Name: H STRMU Enrollment Contract: HOPWA 1415 Units: 1 Price: \$0.00 Cost: \$0.00

☐ Date Invoice Paid ☐ Had Contact with Primary Health Provider ☐ Has accessed Insurance or Assistance ☐ Has Consistent Case Management Contact
☐ Has Housing Plan ☐ Obtained income producing job from HOPWA effort Percent Median Income
 Pre-Enrollment Housing Situation ☐ Qualified Sources of Income HOPWASvcType

Service Comment

4. For the **Percent Median Income**; use HOPWA income determination to make appropriate selection

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Unique IDs | Custom Tab 2 | Chart Number | < | >

Year: 2015

Add/Edit Service Details

Date: 6/17/2015 Service Name: H STRMU Enrollment Contract: HOPWA 1415 Units: 1 Price: \$0.00 Cost: \$0.00

☐ Date Invoice Paid ☐ Had Contact with Primary Health Provider ☐ Has accessed Insurance or Assistance ☐ Has Consistent Case Management Contact
☐ Has Housing Plan ☐ Obtained income producing job from HOPWA effort Percent Median Income
 Pre-Enrollment Housing Situation ☐ Qualified Sources of Income

Service Comment

Percent Median Income dropdown menu options:

- 0-30% of area median income (extremely low)
- 0-30% of area median income (extremely low)
- 31-50% of area median income (very low)
- 51-60% of area median income (low)
- 61-80% of area median income (low)

5. **Pre-Enrollment Housing Situation** refers to the client's living situation when s/he presents for HOPWA enrollment services. Make the appropriate selection from drop-down menu. Refer to [Appendix C](#) for definitions.

Demographics | Drug Services | **Service** | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Unique IDs | Custom Tab 2 | Chart Number

Year: 2015

Date: 6/17/2015 Service Name: H STRMU Enrollment Contract: HOPWA 1415 Units: 1 Price: \$0.00 Cost: \$0.00

Date Invoice Paid: Had Contact with Primary Health Provider: Has accessed Insurance or Assistance: Has Consistent Case Management Contact:

Has Housing Plan: Obtained income producing job from HOPWA effort: Percent Median Income: 0-30% of area median income (extremely low)

Pre-Enrollment Housing Situation: Qualified Sources of Income: HOPWASvcType:

Service Comment:

6. Check the **Qualified Sources of Income** box if the client has at least one of the following:

- Earned Income
- Veteran's Pension
- Unemployment Insurance
- Pension from Former Job
- Supplemental Security Income (SSI)
- Child Support
- Social Security Disability Income (SSDI)
- Alimony or other Spousal Support
- Veteran's Disability Payment
- Retirement Income from Social Security
- Worker's Compensation
- General Assistance (GA), or use local program name
- Private Disability Insurance
- Temporary Assistance for Needy Families (TANF)
- Other Income Sources

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Unique IDs | Custom Tab 2 | Chart Number | < | >

Year:
2015

Add/Edit Service Details


Date: 6/17/2015 Service Name: H STRMU Enrollment Contract: HOPWA 1415 Units: 1 Price: \$0.00 Cost: \$0.00

Date Invoice Paid: Had Contact with Primary Health Provider: Has accessed Insurance or Assistance: Has Consistent Case Management Contact:

Has Housing Plan: Obtained income producing job from HOPWA effort: Percent Median Income: 0-30% of area median income (extremely low)

Pre-Enrollment Housing Situation: Qualified Sources of Income: HOPWASvcType:

Service Comment:



From the **HOPWASvc Type** drop-down menu, choose **Mortgage**, **Rent** or **Utility**, if applicable. If more than one service is rendered at the time of enrollment, enter an Update Service(s) to capture the additional service(s). Refer to instructions below.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Unique IDs | Custom Tab 2 | Chart Number | < | >

Year:
2015

Add/Edit Service Details

Date: 6/17/2015 Service Name: H STRMU Enrollment Contract: HOPWA 1415 Units: 1 Price: \$0.00 Cost: \$0.00


Date Invoice Paid: Had Contact with Primary Health Provider: Has accessed Insurance or Assistance: Has Consistent Case Management Contact:

Has Housing Plan: Obtained income producing job from HOPWA effort: Percent Median Income: 0-30% of area median income (extremely low)

Pre-Enrollment Housing Situation: Qualified Sources of Income: HOPWASvcType:

Service Comment:

Mortgage
Motel/hotel
Rent
Utility



HOPWA STRMU Update

The **H STRMU Update** selection in the **Service Name** field is for all subsequent STRMU services AFTER the enrollment service has been entered. **NOTE:** CAREWare will accept an update service even if there is no enrollment service. Be careful and verify that there is an enrollment service first.

None of the information entered at time of enrollment will carry over; the fields will be blank. If nothing has changed since enrollment, there is no need to make changes to the assessment section.

1. Select the **HOPWASvcType** from the drop down menu.
2. Enter the number of **Units**, if applicable. **Price** and **Cost** will automatically calculate if a price was set in the contract.
3. Save the service.

The screenshot shows the 'Add/Edit Service Details' form in CAREWare. At the top, there is a navigation bar with tabs: Demographics, Drug Services, Service, Annual Review, Encounters, Referrals, HIV C&T, Pregnancy, Relations, Unique IDs, Custom Tab 2, and Chart Number. Below this, a 'Year' dropdown is set to 2015. The main form area is titled 'Add/Edit Service Details' and contains several fields: 'Date' (6/17/2015), 'Service Name' (H STRMU Update), 'Contract' (HOPWA 1415), 'Units' (1), 'Price' (\$0.00), and 'Cost' (\$0.00). Below these are several checkboxes: 'Date Invoice Paid', 'Had Contact with Primary Health Provider', 'Has accessed Insurance or Assistance', 'Has Consistent Case Management Contact', 'Has Housing Plan', 'Obtained income producing job from HOPWA effort', and 'Qualified Sources of Income'. There is also a 'Percent Median Income' dropdown. At the bottom, there is a 'HOPWASvcType' dropdown (highlighted with a red arrow) and a 'Service Comment' text box. At the very bottom, there are buttons for 'Amount Received', 'Save', 'Cancel', and 'Print'.

HOPWA STRMU Exit

A client should receive an exit service when s/he exits the program or by June 30th of each fiscal year, whichever comes *first*. Examples of reasons for exit include but are not limited to: client goes to jail/prison, dies, is institutionalized, etc. If the fiscal year ends and client still requires additional STRMU assistance, enter an exit service with an **STRMU Exit Outcome** of "Current housing arrangements more STRMU." A new enrollment service would be entered for this client on or after July 1st.

1. Select the **H STRMU Exit** from the drop down menu and enter **Price** information is applicable.
2. Select the appropriate outcome from the **STRMU Exit Outcome** drop down menu. Refer to [Appendix C](#) for definitions.
3. Save the service.

Demographics | Drug Services | **Service** | Annual Review | Encounters | Referrals | HIV C&T | Pregnancy | Relations | Unique IDs | Custom Tab 2 | Chart Number

Year: 2015

Add/Edit Service Details

Date: 6/17/2015 Service Name: **H STRMU Exit** Contract: HOPWA 1415 Units: 1 Price: \$0.00 Cost: \$0.00

Date Invoice Paid: STRMU Exit Outcome: Service Comment:

HOPWA TRBA Enrollment

1. Select **H TBRA Enrollment** from the **Service Name** drop down menu.
2. Enter the other pertinent details on the page, i.e. the assessment details, pre-enrollment situation and sources of income. Refer to the instructions on adding a HOPWA STRMU enrollment service, if necessary and [Appendix C](#) for definitions.
3. Select the type of service provided from the **HOPWASvcType** drop down menu if another service is rendered on the same day as the enrollment. A TBRA Update service will need to be entered for any additional services rendered on the same day.
4. Save the service.

Demographics | Drug Services | **Service** | Annual Review | Encounters | Referrals | HIV C&T | Relations | Unique IDs | Non-RW Housing Case Management | Custom Tab 2

Year: 2015

Add/Edit Service Details

Date: 6/17/2015 Service Name: **H TBRA Enrollment** Contract: HOPWA 1415 Units: 1 Price: \$0.00 Cost: \$0.00

Total Hours: ☐ Had Contact with Primary Health Provider ☐ Has accessed Insurance or Assistance ☐ Has Consistent Case Management Contact

☐ Has Housing Plan ☐ Obtained income producing job from HOPWA effort Percent Median Income:

Pre-Enrollment Housing Situation: ☐ Qualified Sources of Income: Service Comment:

Amount Received Save Cancel Print

HOPWA TBRA Update

A TRBA Update service should be recorded for each housing payment made on behalf of a client.

1. Select **H TBRA Update** from the **Service Name** drop down menu and enter the **Price and Contract** information as necessary. There typically should be only one unit provided for each update service.
2. Select the **HOPWASvcType** from the drop down menu.
3. Update assessment information only if the information has changed since the last assist.
4. Save the service.

The screenshot shows a web-based form titled "Add/Edit Service Details". At the top, there are fields for "Date:" (7/19/2012), "Service Name:" (H TBRA Update), "Contract:" (HOPWA), "Units:" (1), "Price:" (\$1.07), and "Cost:" (\$1.07). Below these are three dropdown menus: "Service Comment", "Staff or Provider Name", and "Housing Service Type". The form contains several checkboxes for assessment information: "Had Contact with Primary Health Provider", "Has accessed Insurance or Assistance", "Has Consistent Case Management Contact", "Has Housing Plan", "Obtained income producing job from HOPWA effort", "Qualified Sources of Income", and "HUD defined chronically homeless?". There is also a dropdown menu for "Percent Median Income". At the bottom right, there are four buttons: "Amount Received", "Save", "Cancel", and "Print".

HOPWA TBRA Exit

HOPWA TBRA clients require an exit only when they have separated from the program. Unlike STRMU clients, they should not be exited at the end of each fiscal year.

1. Select **H TBRA Exit** from the **Service Name** drop down menu.
2. Select the appropriate exit outcome from the **Non-STRMU Exit Outcome** drop down menu. Refer to [Appendix C](#) for definitions.
3. Save the service.

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services **Service** Annual Review Encounters Referrals HIV C&T Relations Unique IDs Non-RW Housing Case Management Custody

Year: 2015

Add/Edit Service Details

Date:	Service Name:	Contract:	Units	Price:	Cost:
6/3/2015	H TBRA Exit	HOPWA 1415	1	\$0.00	\$0.00

Total Hours: Non-STRMU Exit Outcome

HOPWA Transitional/Short Term Supportive Service Enrollment (TSTS)

All clients receiving transitional/short term supportive services should have a TSTS Enrollment Service at the beginning of each fiscal year (July 1st).

1. From the Service tab, click on the New Service button.
2. Select **H Transitional Facility Enrollment** from the **Service Name** drop down menu.
3. Enter the other pertinent details on the page, i.e. the assessment details, pre-enrollment situation and sources of income. Refer to the instructions on adding a HOPWA STRMU enrollment service, if necessary, and [Appendix C](#) for definitions.
4. Select the type of service provided from the **HOPWASvcType** drop down menu if another service is rendered on the same day as the enrollment. An **H Transitional Facility Update** service will need to be entered for any additional services rendered on the same day.
5. Select **Hotel/Motel** from the **HOPWASvcType** drop down box.
6. Save the service.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Relations | Unique IDs | Non-RW Housing Case Management | Custody

Year: 2015

Add/Edit Service Details

Date:	Service Name:	Contract:	Units:	Price:	Cost:
6/17/2015	H Transitional Facility Enrollment	HOPWA 1415	1	\$0.00	\$0.00

☐ Total Hours ☐ Had Contact with Primary Health Provider ☐ Has accessed Insurance or Assistance ☐ Has Consistent Case Management Contact

☐ Has Housing Plan ☐ Obtained income producing job from HOPWA effort Percent Median Income

Pre-Enrollment Housing Situation ☐ Qualified Sources of Income Service Comment

HOPWA Transitional/Short Term Supportive Service Update (TSTS)

1. Select **H Transitional Facility Update** from the Service Name drop down menu and enter the **Price and Contract** information as necessary. There typically should be only one unit provided for each update service.
2. Select the **HOPWASvcType** from the drop down menu.
3. Update assessment information only if the information has changed since the last assist.
4. Save the service.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Relations | Unique IDs | Non-RW Housing Case Management | Custody

Year: 2015

Add/Edit Service Details

Date: 6/17/2015 Service Name: H Transitional Facility Update Contract: HOPWA 1415 Units: 1 Price: \$0.00 Cost: \$0.00

Total Hours: ☐ Had Contact with Primary Health Provider ☐ Has accessed Insurance or Assistance ☐ Has Consistent Case Management Contact

☐ Has Housing Plan ☐ Obtained income producing job from HOPWA effort Percent Median Income:

☐ Qualified Sources of Income Service Comment: HOPWASvcType:

Amount Received Save Cancel Print

HOPWA Transitional/Short Term Supportive Service Exit (TSTS)

A client should receive a TSTS exit service when s/he exits the program or by June 30th of each fiscal year, whichever comes *first*. Examples of reasons for exit include but are not limited to: client goes to jail/prison for a long period of time, dies, is institutionalized, etc.

1. Select the **H Transitional Facility Exit** from the drop down menu and enter Price information is applicable.
2. Select the appropriate outcome from the **Non-STRMU Exit Outcome** drop down menu.
3. Save the service.

Demographics | Drug Services | Service | Annual Review | Encounters | Referrals | HIV C&T | Relations | Unique IDs | Non-RW Housing Case Management | Custody

Year: 2015

Add/Edit Service Details

Date: 6/17/2015 Service Name: H Transitional Facility Exit Contract: HOPWA 1415 Units: 1 Price: \$0.00 Cost: \$0.00

Total Hours: Non-STRMU Exit Outcome: Service Comment:

Entering HOPWA Supportive Services

1. Permanent Housing Placement Assistance
 - a. On the Service Tab, enter the **Date** of service
 - b. Using the **Service Name** drop down menu select **HOPWA Permanent Housing Placement Svc**
 - c. Enter the type of service rendered from the **HOPWASrvType** dropdown menu
 - d. If necessary, enter a comment in the **Service Comment** box
2. Case Management
 - a. On the Service Tab, enter the **Date** of service
 - b. Using the **Service Name** drop down menu select **HOPWA Case Management**
 - c. If necessary, enter a comment in the **Service Comment** box
3. Housing Information Services
 - a. On the Service Tab, enter the **Date** of service
 - b. Using the **Service Name** drop down menu select **HOPWA Housing Information Svc**
 - c. If necessary, enter a comment in the **Service Comment** box

Part 20 – Sharing

Sharing data (Case Notes, Services, Encounters)

The sharing of certain client data points is available to those agencies that would like to participate. In order to activate sharing, a senior member of the agency must put in a Help Desk ticket. After requesting that sharing be turned on, the agency must identify those individuals who should be given the ability to grant/deny and request share requests for their agency. **IMPORTANT NOTE:** If sharing is requested from Agency A and granted by Agency B, that does not mean Agency B can automatically see Agency A's data on the same client. Agency B would have to go through the same process of requesting sharing and Agency A would need to grant those requests in order for Agency B to see Agency A's information.

To request sharing of Case Notes data select the **Sharing** button.

Case Notes (Rapid Entry)

Client: Brontosaurus, Betty

From: 1/21/2014 Through: 1/21/2015

☒ Only show this provider

Templates Report

Sharing Close

Note:

Date:

Author:

☐ Add Service

Save

Cancel

Paste Template

Spell Check

Thesaurus

Search 0/0

Date	Provider	Case Note	Author

Add

Edit

Append

Delete

Click **New Request**

Case Note Sharing

We share this client's Case Note records with:

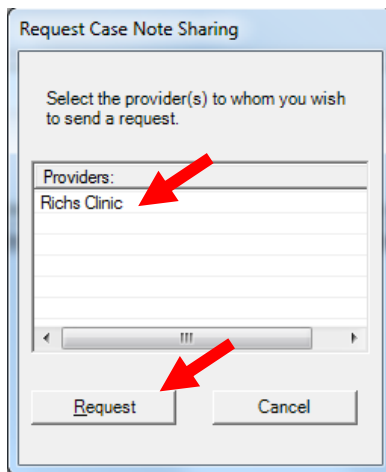
Providers sharing this client's Case Note records with us:

Provider	Share Type	Start Date	Expiration	Notes

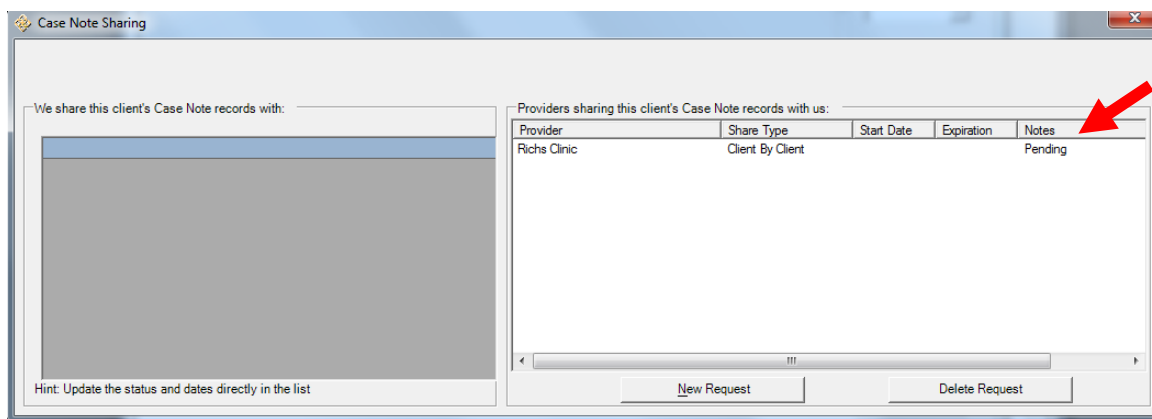
Hint: Update the status and dates directly in the list

New Request Delete Request

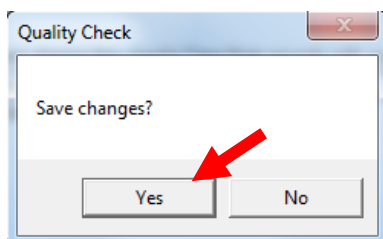
The **Request Case Note Sharing** tab will list all the other agencies that have the client you are requesting to share. Click on the agency and hit **Request**.



You will now see a "Pending" request on the **Case Note Sharing** screen.



Upon closing the Case Note Sharing screen click **Yes** to Save changes.



To request sharing of Service information select the **Service Sharing** button.

The screenshot shows the 'Brontosaurus, Betty' client service form. At the bottom, a red arrow points to the 'Service Sharing' button. Other buttons visible include 'Preview Services', 'New Service', 'Edit Service', and 'Delete Service'.

Click **New Request**.

The screenshot shows the 'ServiceSharing' window for 'Brontosaurus, Betty'. It features a table titled 'Providers sharing this client's services with us:' with columns: Provider, Share Type, Start Date, Expiration, and Notes. At the bottom right, a red arrow points to the 'New Request' button. A 'Delete Request' button is also visible.

The **Request Service Sharing** tab will list all the other agencies that have the client you are requesting to share. Click on the agency and hit **Request**.

Request Service Sharing

Select the provider(s) to whom you wish to send a request.

Providers:

Richs Clinic

Request Cancel

You will now see a "Pending" request on the **Service Sharing** screen.

ServiceSharing

Brontosaurus, Betty

We share this client's services with:

Providers sharing this client's services with us:

Provider	Share Type	Start Date	Expiration	Notes
Richs Clinic	Client By Client			Pending

Hint: Update the status and dates directly in the list

New Request Delete Request

Upon closing the Service Sharing screen click **Yes** to Save changes.

Quality Check

Save changes?

Yes No

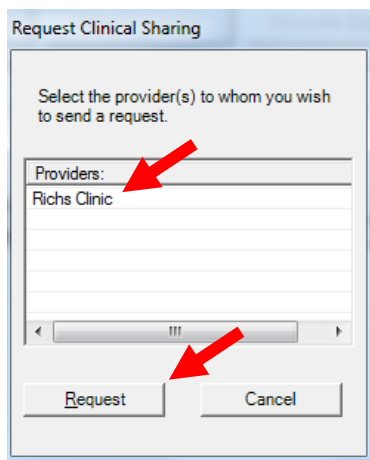
To request sharing of **Encounters** data select the **Sharing Options** button.

The screenshot shows the 'Brontosaurus, Betty' client record interface. At the top, there is a navigation bar with tabs: Appointments, Orders, Forms, ChangeLog, Client Report, Merge Client, Delete Client, Find List, New Search, and Close. Below this is a sub-navigation bar with tabs: Demographics, Drug Services, Service, Annual Review, Encounters, Referrals, HIV C&T, Pregnancy, Relations, Custom Tab 1, Unique IDs, and Custom Tab 3. The 'Encounters' tab is selected. In the 'Encounter Date' section, there is a dropdown menu showing '01/21/2015 | Jeffrey S.' and buttons for 'Create Encounter', 'Delete Encounter', 'Encounter Report', and 'Sharing Options'. The 'Sharing Options' button is highlighted with a red arrow. Below this is a section for 'Vital Signs' with a 'Rapid Entry' button and a 'Values are in:' dropdown menu showing 'English' and 'Metric'. There is a table for vital signs with columns: Prior Value, Date Taken, Current Value, and Current Value Provider. The rows are: Height(inches), Weight(lbs), Pulse (bpm), Temperature(F), and B.P. Sys/Dia. Below the table is a 'Pregnant?' section with checkboxes for 'Last visit' and 'Currently', and a 'View/Edit History' button.

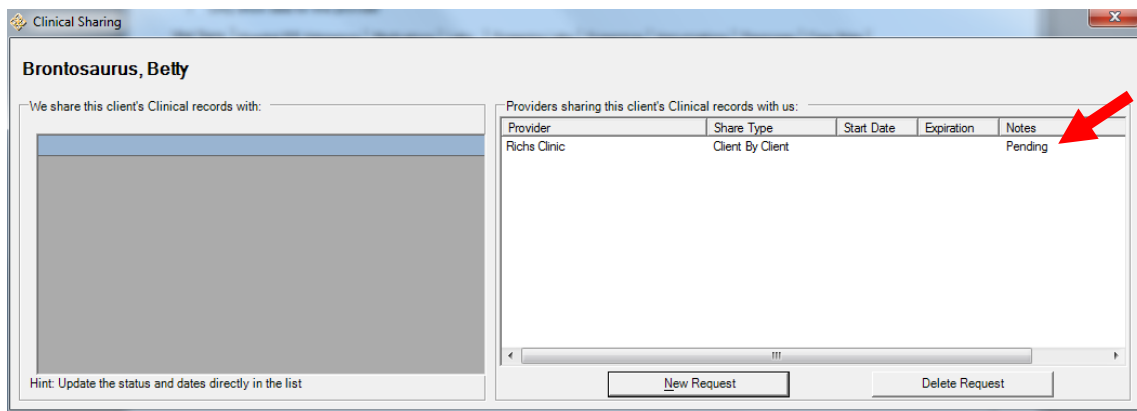
Click **New Request**

The screenshot shows the 'Clinical Sharing' interface. At the top, there is a title bar with a 'Clinical Sharing' icon and a close button. Below this is a section for 'Brontosaurus, Betty'. On the left, there is a section titled 'We share this client's Clinical records with:' with a large empty box. On the right, there is a section titled 'Providers sharing this client's Clinical records with us:' with a table. The table has columns: Provider, Share Type, Start Date, Expiration, and Notes. Below the table is a 'Hint: Update the status and dates directly in the list' and two buttons: 'New Request' and 'Delete Request'. The 'New Request' button is highlighted with a red arrow.

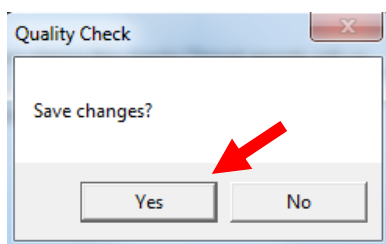
The **Request Clinical Sharing** tab will list all the other agencies that have the client you are requesting to share. Click on the agency and hit Request.



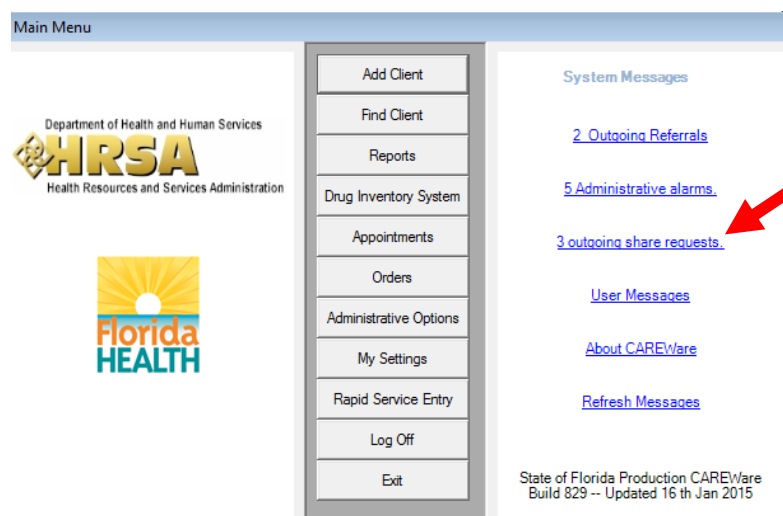
You will now see a "Pending" request on the **Clinical Sharing** screen.



Upon closing the Clinical Sharing screen click **Yes** to Save changes.



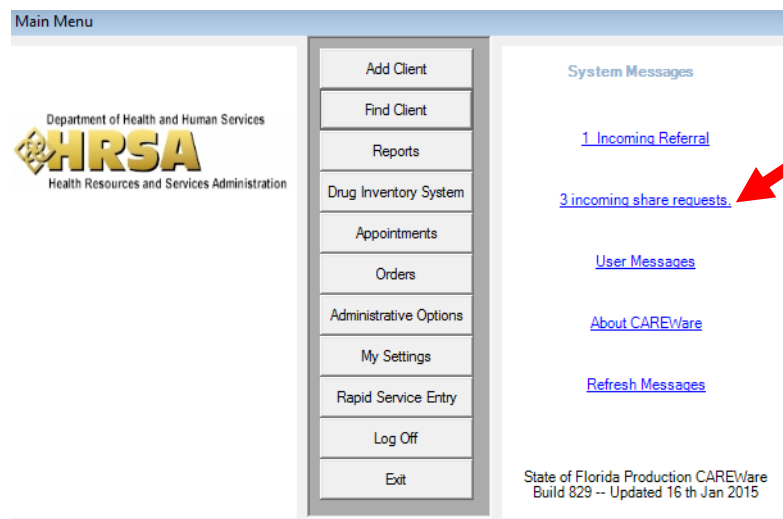
On the main menu, you will now see outgoing share requests. Since sharing on Case Notes, Services and Encounters was requested from Rich's Clinic for the client Betty Brontosaurus, you see **3 outgoing share requests**. Share requests are counted by tab, not by client.



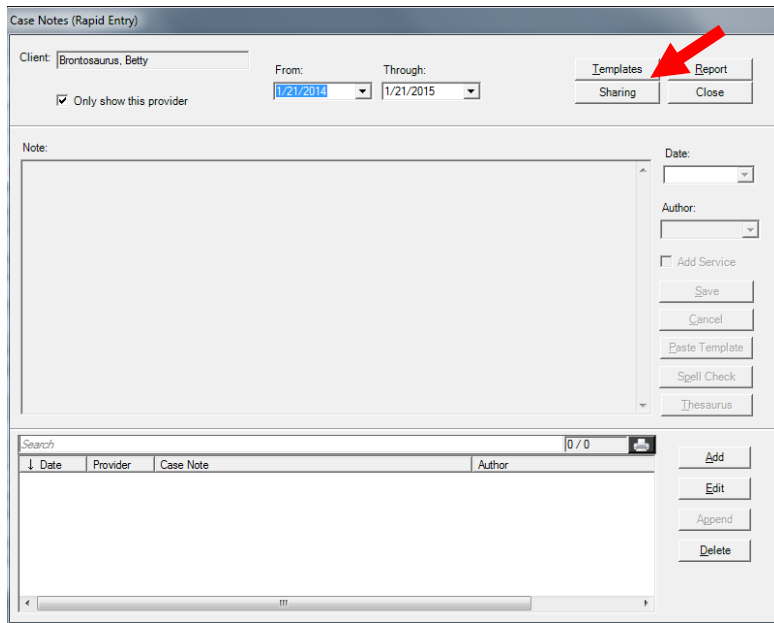
Granting/Denying share requests

The agency you requested the sharing of data from will see incoming requests. Again, due to the fact that sharing on Case Notes, Services and Encounters was requested from Rich's Clinic for the client Betty Brontosaurus, you see **3 incoming share requests**. Share requests are counted by tab, not by client.

Each agency is responsible for selecting staff members to approve/deny share requests they receive. An agency may change a Granted share request to Denied at any time, and vice versa. That Denied/Granted status goes into effect immediately.



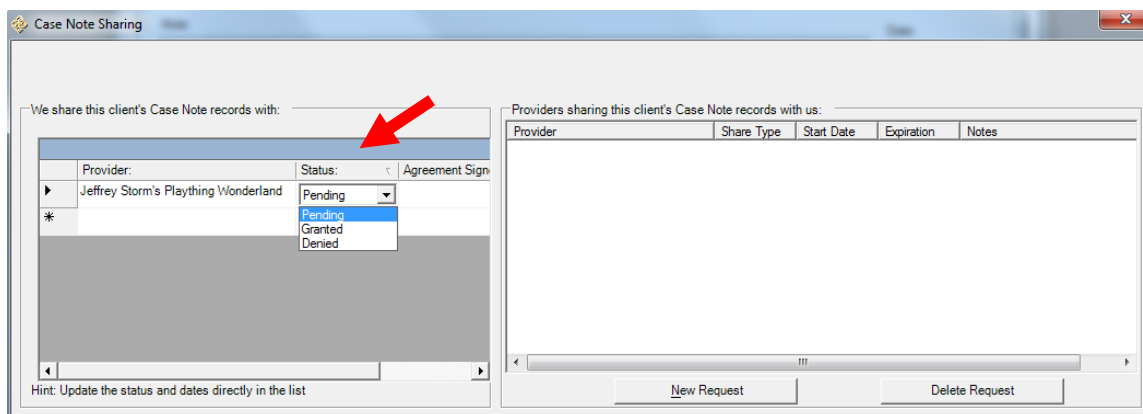
To grant/deny sharing of Case Notes data select the **Sharing** button.



The screenshot shows the 'Case Notes (Rapid Entry)' window. At the top, there is a client selection field with 'Brontosaurus, Betty' and date range filters 'From: 1/21/2014' and 'Through: 1/21/2015'. A red arrow points to the 'Sharing' button, which is located next to 'Templates', 'Report', and 'Close' buttons. Below the client information is a large text area for the 'Note'. To the right of the note area are fields for 'Date', 'Author', and a checkbox for 'Add Service'. Below these are buttons for 'Save', 'Cancel', 'Paste Template', 'Spell Check', and 'Thesaurus'. At the bottom, there is a search bar and a table with columns 'Date', 'Provider', 'Case Note', and 'Author'. To the right of the table are buttons for 'Add', 'Edit', 'Append', and 'Delete'.

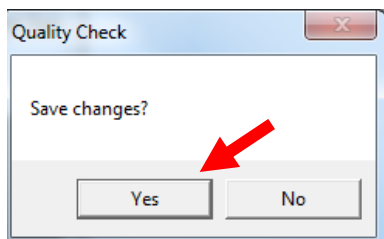
The **Case Note Sharing** tab will show all the other agencies that are requesting sharing from your agency.

Select either **Granted** or **Denied** in the **Status** drop down box. By choosing **Granted**, the other agency will be able to see your client's case notes. Choosing **Denied** results in the other agency not being able to see your case notes. Note, while in **Pending** status the other agency will not be able to see your case notes.

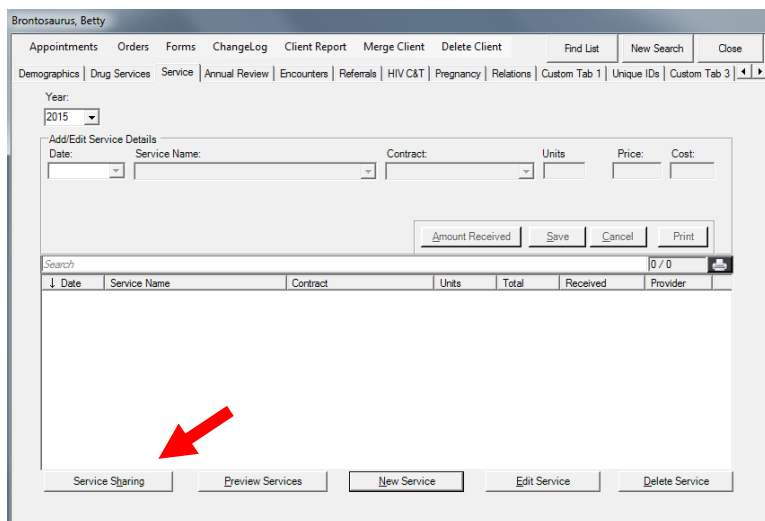


The screenshot shows the 'Case Note Sharing' window. It has two main sections. The left section, titled 'We share this client's Case Note records with:', contains a table with columns 'Provider', 'Status', and 'Agreement Sign'. A red arrow points to the 'Status' dropdown menu, which is currently set to 'Pending'. The dropdown menu shows options: 'Pending', 'Granted', and 'Denied'. The right section, titled 'Providers sharing this client's Case Note records with:', contains a table with columns 'Provider', 'Share Type', 'Start Date', 'Expiration', and 'Notes'. At the bottom of the window are buttons for 'New Request' and 'Delete Request'. A hint at the bottom left says 'Hint: Update the status and dates directly in the list'.

Upon closing the Case Note Sharing screen click **Yes** to Save changes.

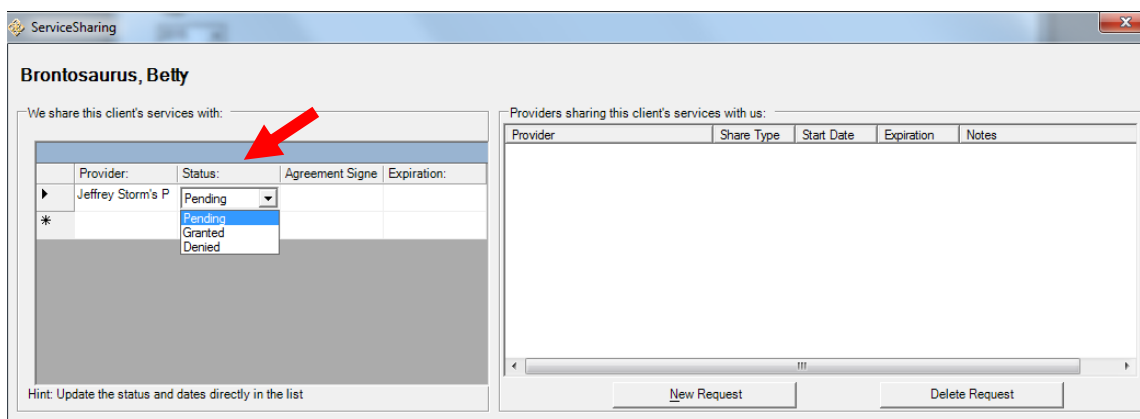


To grant/deny sharing of **Service** data select the **Service Sharing** button.

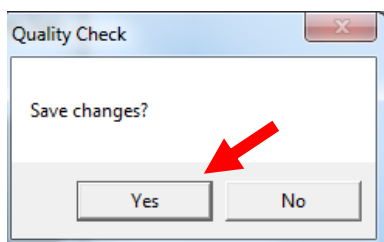


The **Service Sharing** tab will show all the other agencies that are requesting sharing from your agency.

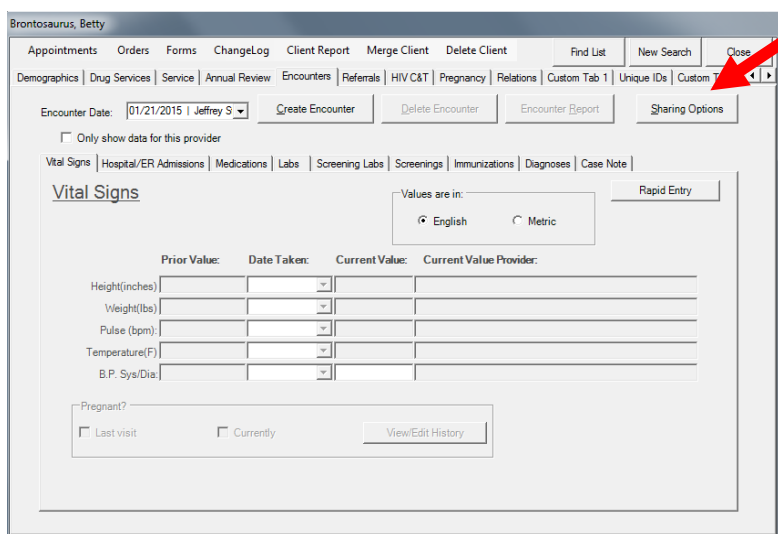
Select either **Granted** or **Denied** in the **Status** drop down box. By choosing **Granted**, the other agency will be able to see your client's case notes. Choosing **Denied** results in the other agency not being able to see your services. Note, while in **Pending** status the other agency will not be able to see your services.



Upon closing the Service Sharing screen click **Yes** to Save changes.

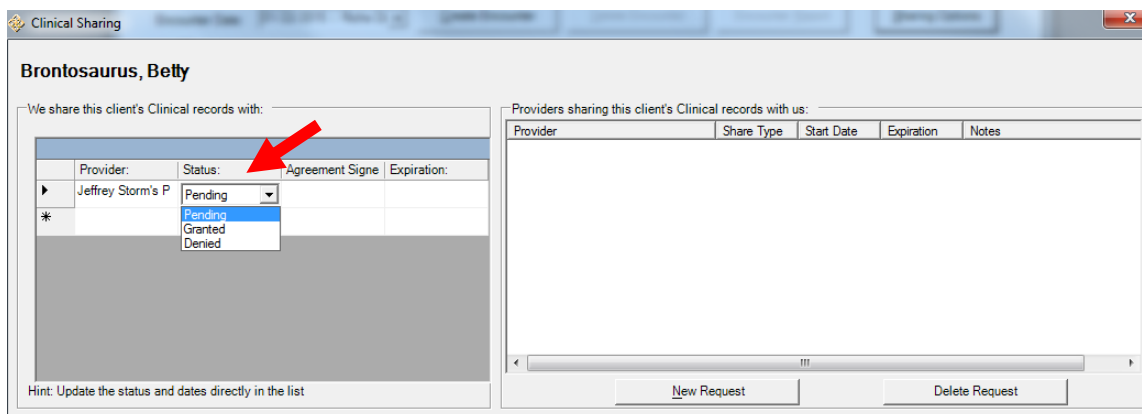


To grant/deny sharing of **Encounters** data select the **Sharing Options** button.

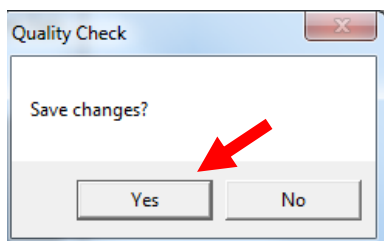


The **Clinical Sharing** tab will show all the other agencies that are requesting sharing from your agency.

Select either **Granted** or **Denied** in the **Status** drop down box. By choosing **Granted**, the other agency will be able to see your client's clinical information. Choosing **Denied** results in the other agency not being able to see your clinical information. Note, while in **Pending** Status the other agency will not be able to see your clinical information.

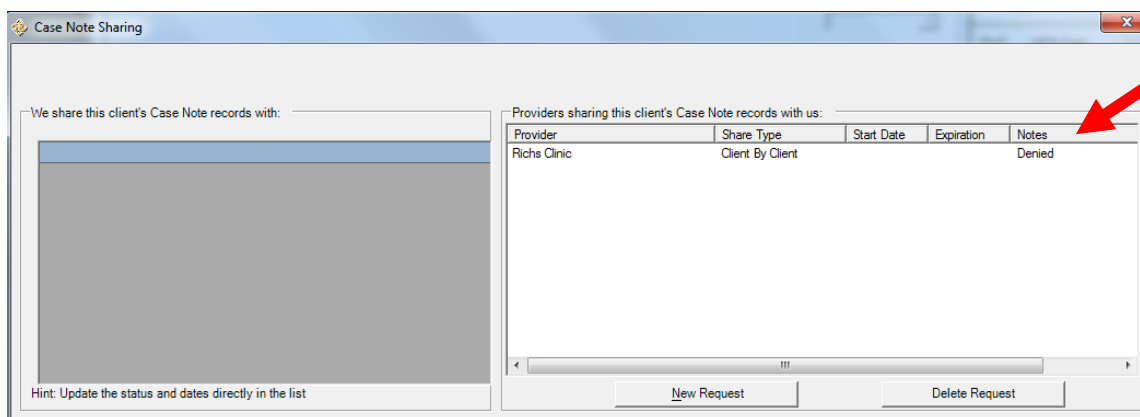


Upon closing the Clinical Sharing screen click **Yes** to Save changes.

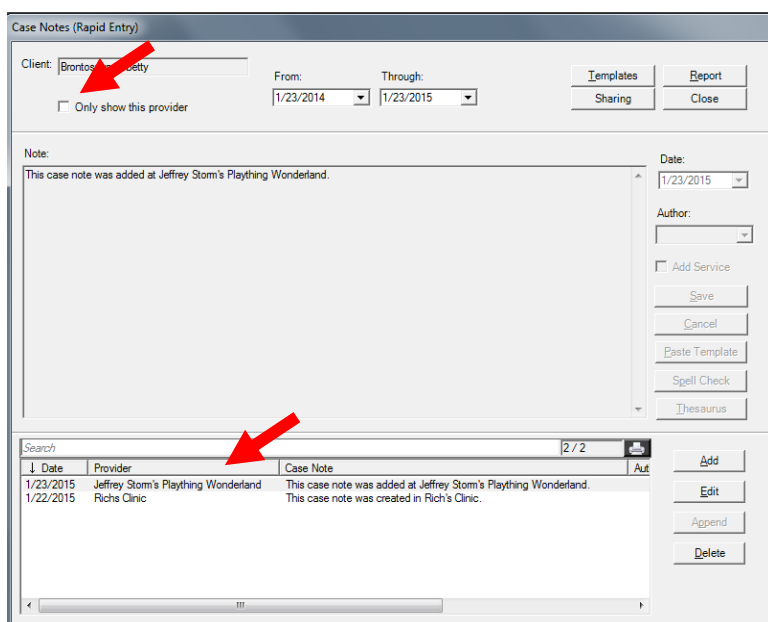


Viewing sharing data

If **Case Note Sharing** is not approved, Denied will be listed in the Notes column.



if Case Notes Sharing is approved, after unchecking **Only show this provider**, case notes will be visible from the agency that approved sharing. Note, you will not be able to edit nor delete the case notes from the other agency.



If **Service Sharing** is not approved, Denied will be listed in the Notes column.

ServiceSharing

Brontosaurus, Betty

We share this client's services with:

Providers sharing this client's services with us:

Provider	Share Type	Start Date	Expiration	Notes
Richs Clinic	Client By Client			Denied

Hint: Update the status and dates directly in the list

New Request Delete Request

If Service Sharing is approved, services will be visible from the agency that approved sharing. Note, you will not be able to edit nor delete the services from the other agency.

Brontosaurus, Betty

Appointments Orders Forms ChangeLog Client Report Merge Client Delete Client Find List New Search Close

Demographics Drug Services Service Annual Review Encounters Referrals HIV C&T Pregnancy Relations Custom Tab 1 Unique IDs Custom Tab 3

Year: 2015

Add/Edit Service Details

Date: Service Name: Contract: Units: Price: Cost:

Amount Received Save Cancel Print

Search 1 / 1

Date	Service Name	Contract	Units	Total	Received	Provider
1/23/2015	Case Mgmt (Non-Medical)	Hills 09823	1	\$0.00	\$0.00	Jeffrey Stom's Plaything Wonderland
1/22/2015	Ambulatory/Outpatient Medical Care	fake	1	\$0.00	\$0.00	Richs Clinic

Service Sharing Preview Services New Service Edit Service Delete Service

If **Clinical Sharing** is not approved, Denied will be listed in the Notes column.

Clinical Sharing

Brontosaurus, Betty

We share this client's Clinical records with:

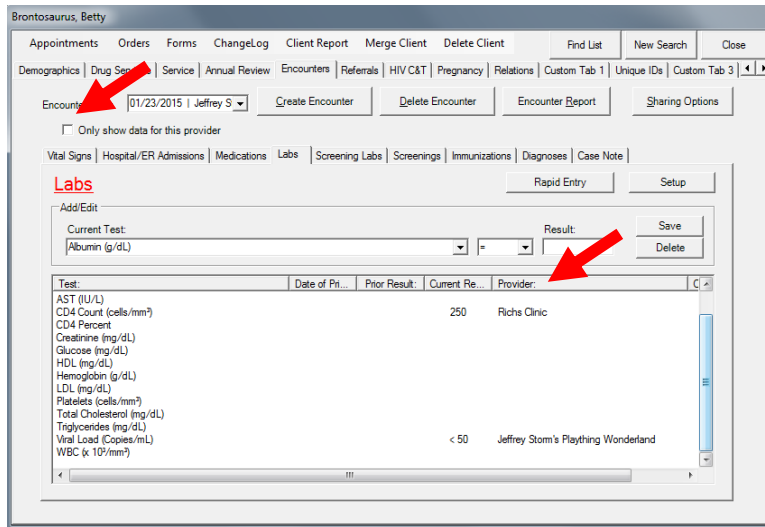
Providers sharing this client's Clinical records with us:

Provider	Share Type	Start Date	Expiration	Notes
Richs Clinic	Client By Client			Denied

Hint: Update the status and dates directly in the list

New Request Delete Request

If **Encounters** Sharing is approved, after unchecking **Only show data for this provider**, Encounters' data will be visible from the agency that approved sharing. Note, you will not be able to edit nor delete the Encounters' data from the other agency.



Brontosaurus, Betty

Appointments | Orders | Forms | ChangeLog | Client Report | Merge Client | Delete Client | Find List | New Search | Close

Demographics | **Encounters** | Service | Annual Review | Referrals | HIV C&T | Pregnancy | Relations | Custom Tab 1 | Unique IDs | Custom Tab 3

Encounter: 01/23/2015 | Jeffrey S | Create Encounter | Delete Encounter | Encounter Report | Sharing Options

☐ Only show data for this provider

Vital Signs | Hospital/ER Admissions | Medications | Labs | Screening Labs | Screenings | Immunizations | Diagnoses | Case Note

Labs | Rapid Entry | Setup

Add/Edit

Current Test: Albumin (g/dL) | Result: | Save | Delete

Test	Date of Pst...	Prior Result	Current Re...	Provider
AST (IU/L)				
CD4 Count (cells/mm ³)		250		Richs Clinic
CD4 Percent				
Creatinine (mg/dL)				
Glucose (mg/dL)				
HDL (mg/dL)				
Hemoglobin (g/dL)				
LDL (mg/dL)				
Platelets (cells/mm ³)				
Total Cholesterol (mg/dL)				
Triglycerides (mg/dL)				
Viral Load (Copies/mL)		< 50		Jeffrey Storm's Plaything Wonderland
WBC (x 10 ³ /mm ³)				

Chapter IV – Data Confidentiality/Requirements

Background – There is no higher priority than maintaining the security of our client's protected health information. Making sure to use secure methods of communication is a mandate, not a request. If at any time you are unsure of whether or not a method of communication is considered secure, contact the Help Desk at 850-922-7599 and put in a Help Desk ticket (making sure to have the operator assign it to the CAREWare Team) and we will assist you. The same is true if you are uncertain if particular data elements are considered confidential. Again, contact the Help Desk at 850-922-7599 and put in a Help Desk ticket (making sure to have the operator assign it to the CAREWare Team) "requesting assistance with a security issue." Do not give the Help Desk operator the specific data values you have questions about for the Help Desk data system is not a secure database. Additionally, this chapter includes details concerning the information expected to be inputted for clients added to CAREWare.

Part 21 – Appendix A. Confidential CAREWare Client Identifiers

The following identifiers of an individual, or of relatives, employers or household members of an individual, are considered confidential for the purposes of the sharing of CAREWare data. **You cannot share any of these identifiers electronically unless the electronic transmission is encrypted.** This list is not exhaustive; please contact the Help Desk at 850-922-7599 and ask for a member of the CAREWare Team to return your call if you have any questions. If you must make a change to a client's record, inform the Help Desk operator that you need client data changed. Do not give any of the fields identified below to the Help Desk operators when calling in a ticket. If you work for a private agency, contact the Help Desk at 850-922-7599 and ask to have a Movelt account set up with the CAREWare Team.

CAREWare Data Fields

Information in the DEMOGRAPHICS TAB

- Legal First Name
- Any alias or nickname
- Middle Name
- Legal Last name
- Date of Birth (except year; and all ages over 89 and all elements of dates [including year] indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older)
- Address
- City
- Zip Code
- County
- Phone Number
- HIV+ Date (except year)
- AIDS Date (except year)
- Deceased Date (except year)
- Enrl Date (except year)

Information in the SERVICE TAB

- Service Details
 - Date (except year)

Information in the ENCOUNTERS TAB

1. Vital Signs Sub-Tab

- Estimated Conception Date (except year)
- Prenatal Begin Date (except year)
- Delivery/Outcome Date (except year)

2. Medications Sub-Tab

- Every time medication is prescribed complete as applicable: Start, Stop, Correct Data Error, or Change Dose (except year)

3. Labs Sub-Tab

- Test Date (except year)

4. Screening Labs Sub-Tab

- Test Date (except year)

5. Screening Sub-Tab

- Test Date (except year)
- Action Date (except year)
- Annual TB Screening Date (except year)
- Pap (except year)

6. Immunizations Sub-Tab

- Hep B, Date of Shots (except year)
- Hep C, Date of Shots (except year)

Information in the UNIQUE ID TAB

- **Do not e-mail any scanned document unencrypted**
- Medicaid #
- Medicare #
- PAC #
- Social Security #
- Date eligibility expires (except year)

Required Information in the FORMS TAB

- Eligibility Staff Assessment Worksheet
- Insurance Waiver Form
- Notice of Eligibility or Ineligibility
- Six Month Recertification

Protected Health Information, as per 45 CFR 164.514

- Names
- All geographic subdivisions smaller than a state, including street address, city, county, precinct and zip code
- All elements of dates (except year) for dates directly related to an individual, including birth date, admission date, discharge date, date of death; and all ages over 89 and all elements of dates (including year) indicative of such age, except that such ages and elements may be aggregated into a single category of age 90 or older
- Telephone numbers
- Fax numbers
- Electronic mail addresses
- Social Security numbers
- Medical record number
- Unique Record Number (URNs)
- Health plan beneficiary numbers
- Account numbers
- Certificate/license numbers
- Vehicle identifiers and serial numbers, including license plate numbers
- Device identifiers and serial numbers
- Web Universal Resource Locators (URLs)
- Internet Protocol (IP) address numbers
- Biometric identifiers, including finger and voice prints
- Full face photographic images and any comparable images
- Any other unique identifying number, characteristic or code

Part 22 – Appendix B. CAREWare Data Entry Requirements

Purpose

The purpose of this attachment is to identify the information that must be captured and entered into CAREWare. Providers should ensure patient care services paid for by Ryan White Part B, Patient Care Network, and General Revenue are entered into the CAREWare system for reporting purposes. In addition, this attachment provides information on how the collected data must be entered to ensure data consistency and integrity.

Please see the Florida HIV/AIDS Eligibility Procedures Manual for eligibility requirements. HOPWA CAREWare data entry requirements are provided in a separate document.

Yellow highlighted data is mandated due to HRSA RSR and/or HRSA performance measure requirements. The remaining information is required due to HIV/AIDS Section business needs.

**Required
Information in the
DEMOGRAPHICS
TAB**

Demographic information must be collected for **all** eligible clients seeking patient care services by the person determining eligibility, regardless of whether or not the client actually receives a service. Demographic information must include the following, at a minimum:

1. Legal First Name (any alias or nickname belongs in Common Notes)
2. Middle Name (if applicable)
3. Legal Last name
4. Gender (including Transgender subgroup)
5. Date of Birth (mm/dd/yyyy)
6. Sex at Birth
7. Street Address
8. City
9. State
10. Zip Code
11. County
12. Phone Number (if applicable) (include dashes)
13. Race
14. Asian Subgroup
15. Pacific Subgroup
16. Ethnicity
17. Hispanic Subgroup
18. Enrollment Status
19. Enrollment Date
20. Case Closed Date (if applicable)
21. Vital Status
22. Date of Death (if applicable)
23. HIV Status
24. HIV+ Date
25. AIDS Date (if applicable)
26. HIV risk factors

**Required
Information in the
SERVICE TAB**

For any patient care service paid for by Ryan White Part B,

1. Year (select year of service)
2. Add/Edit Service Details
 - a. Date
 - b. Service Name
 - c. Contract (current Contract)
 - d. Units

Patient Care
Network, General
Revenue, or State
HOPWA

**Required
Information in the
ANNUAL REVIEW
TAB**

Review and update
at every eligibility
determination.

1. Primary Insurance
2. Other Insurance
3. Household Income
4. Household Size
5. Poverty Level (will populate automatically)
6. HIV Primary Care
7. Housing Arrangement

For any client receiving Ambulatory/Outpatient Medical Care services (paid for by Ryan White Part B, Patient Care Network, or General Revenue) complete the questions below:

8. HIV Risk Reduction Counseling
 9. Result
 10. Counseled by
 11. Mental Health
 12. Counseled by
 13. Substance Abuse
 14. Result
-

**Required
Information in the
ENCOUNTERS
TAB**

Create an encounter, as appropriate, for any client receiving Ambulatory/Outpatient Medical Care services (paid for by Ryan White Part B, Patient Care Network, or General Revenue) added on the service tab of CAREWare.

1. **Vital Signs Sub-Tab** (For female clients who are pregnant or delivered within the calendar year.)

Select View/Edit History

Add data for the following fields

- a. Estimated Conception Date
 - b. Prenatal Begin Date
 - c. # Prenatal Visits
 - d. Delivery/Outcome Date
 - e. HIV Status of Newborn
 - f. Pregnancy Outcome
 - g. ART Counseling?
 - h. ART Offered?
 - i. ART Taken?
 - j. ART Date?
-

2. Medications Sub-Tab

- a. HIV-associated medications including ARVs, Ols, or other
- b. Units, Form, Strength, Frequency, Indication, and OI condition, if applicable
- c. Every time medication is prescribed complete as applicable: Start, Stop, Correct Data Error, or Change Dose

3. Labs Sub-Tab

Current Test and Result (CD4 and Viral Load) for every lab test

4. Screening Labs Sub-Tab

Current Test, Result, Titer and Treatment for Syphilis, if applicable. Also, Hep B, Hep C screening lab data as applicable.

5. Screening Sub-Tab

Current Test, Current Result, Current Action and Current Score for the following screenings, as applicable: Annual TB Screening, Pap Smear

6. Immunizations Sub-Tab

As applicable: Hep B, Hep C

Required Information in the UNIQUE ID TAB

1. Select the "Attachments" hyperlink to upload:
 - a. Proof of living in Florida
 - b. Proof of identity
 - c. Verification of income
 - d. Proof of HIV
 - e. Proof the program is payer of last resort
 - f. Signed Application
 - g. Signed Notice of Eligibility (every time eligibility is renewed)
 - h. Signed Notice of Ineligibility (if applicable)
2. Medicaid # no dashes (if applicable)
3. Medicare # include dashes (###-##-####) (if applicable)
4. PAC # no dashes (if applicable)
5. Social Security # include dashes (###-##-####)
(If client has no Social Security number please use the alternate identification number formula outlined in Section 8 of the Florida HIV/AIDS Eligibility Procedures Manual.)
6. Date Eligibility Expires
7. Key Points of Entry

-
1. Eligibility Staff Assessment Worksheet (One time only)
-

**Required
Information in the
FORMS TAB**

-
- unless the client file is closed for a period of a year or more, then a new application should be completed.)
2. Insurance Waiver Form (if applicable)
 3. Notice of Eligibility or Ineligibility (every six months)
 4. Six Month Recertification (every six months)

All forms are custom sub forms. This means these forms are kept each time they are completed and will provide a history over time. You must check the box in the top left corner of the form to fill it in and save.



HIV/AIDS Section CAREWare Account Request Form

DOH Help Desk Ticket Number: [Click here to enter text.](#)

☐ New User

For county health department/Department of Health staff, please include the applicant's current Network ID [Click here to enter text.](#)

☐ Close Account ☐ Access Additional Domains ☐ Adjust User Access Level/Groups ☐ Other

For these selections, please include the applicant's current CAREWare User ID [Click here to enter text.](#)

First Name

[Click here to enter text.](#)

Last Name

[Click here to enter text.](#)

Middle Initial

[Click here to enter text.](#)

Job Title

[Click here to enter text.](#)

Work Phone

[Click here to enter text.](#)

Extension

[Click here to enter text.](#)

Email Address

[Click here to enter text.](#)

Agency Name

[Click here to enter text.](#)

Agency Address

[Click here to enter text.](#)

Agency City

[Click here to enter text.](#)

Agency Zip

[Click here to enter text.](#)

User Access Level (pick only one)

☐ Basic User (standard group)

☐ View Only

☐ Provider Administrator **

☐ Reporting Section

☐ Help Desk

☐ Community Programs' Staff Member

** If a user is given Provider Administrator rights, he/she will be able to approve CAREWare Request Forms for future individuals. If you do not want a person to have the ability to approve or request new users, close out accounts, etc., do not grant them the Provider Administrator User Level.

Additional User Groups (multiple options may be selected in this group)

☐ Contract Set Up

☐ PDI User

☐ Delete Merge Client

☐ Sharing Approver

☐ Edit Values

☐ Sharing Requestor

☐ Mapping Group

☐ User Administration

Comments box

[Click here to enter text.](#)

Applicant's Signature

Date

I acknowledge that I have read and understand the Department of Health (DOH) Information Security and Privacy Policy (DOHP 50-10-10), the Confidential CAREWare Client Identifiers – Appendix A and the Protocol for Breaches of Confidentiality of CAREWare Data. I will follow all of the rules and regulations outlined in the DOHP 50-10-10 and the Confidential CAREWare Client Identifiers – Appendix A. I further agree to follow the CAREWare Data Entry Requirements – Appendix B along with the rules and standards set down in the CAREWare Manual and in the Protocol for Breaches of Confidentiality of CAREWare Data. I understand that failure to adhere to these rules and regulations may result in disciplinary action up to and including removal of access to CAREWare and/or dismissal.

Supervisor's Signature

Supervisor Print Name

Date

The Agency must notify the Help Desk at least five (5) days prior to any CAREWare User's final day of employment. If termination is unexpected, the Help Desk needs immediate notice. The Help Desk must also be informed of any misuse by a CAREWare User, as well as if a CAREWare User changes positions within the Agency and should no longer have access. The contact number for the Help Desk is 850-922-7599. Make sure to inform the Help Desk technician this call should be assigned to the CAREWare team.

Agency CAREWare Provider Administrator – A CAREWare Provider Administrator must approve any action on a CAREWare Request Form. They must print and sign their name and add their CAREWare user id. An Agency CAREWare Provider Administrator can only approve actions for the agency they belong to.

Agency CAREWare Provider Administrator (Print Name)

Agency CAREWare Provider Administrator (Signature)

Agency CAREWare Provider Administrator (User ID)

CAREWare Account Request Form Instructional Guide

The first step in getting a CAREWare Account Request Form (CARF) completed is calling the Help Desk at 850-922-7599. (**"NEW"** accounts need to be requested by the agency's CAREWare Provider Administrator. If this person is not available, a Supervisor from the agency who is an existing CAREWare user needs to call in the Help Desk ticket.) Tell the Help Desk operator that you want to fill out a CAREWare Account Request Form. The operator will create a ticket for your request. Make sure you tell the operator to assign the ticket to the CAREWare Team. A CAREWare Team member will attach a CARF to the ticket which you will then receive via email. Print off the completed document and have both the applicant and the applicant's supervisor sign and date the form. Open the email you received from the Help Desk and hit reply all. Add the following sentence to the email, "I have attached the CARF." Attach the scanned signed form to the email reply and hit send.

Fields

DOH Help Desk Ticket Number – Enter the Help Desk ticket number assigned to this request.

New User – Check this box for staff who do not have a current CAREWare user id.

Network ID - For County Health Department/Department of Health staff, please include the applicant's current Network ID. This is the id the staff member uses to log into their computer.

Close Account – To remove access to an agency.

Access Additional Domains – To grant access to additional agencies for an existing CAREWare user.

Adjust User Access Level/Groups – To change the User Access Level or add additional User Groups to the user's profile. A person can only belong to one User Access Level per agency.

Other- If the action you are requesting does not fall under one of the other CARF request items (such as New User, Close Account, Access Additional Domains, or Adjust User Access Level/Groups) then place a check mark in this box. Make sure to add a description to the Comments Box in the middle of the form detailing what you need done.

Only the CAREWare User ID and Agency Name need to be filled out for **Close Account**, **Access Additional Domains**, **Adjust User Access Level/User Groups** and **Other** actions. The following fields may remain blank: Agency Address, Agency City, Agency Zip, First Name, Last Name, Middle Initial, Job Title, Work Phone Number, Extension and Email Address.

First Name – First name of applicant.

Last Name – Last name of applicant.

Middle Initial –Middle initial of applicant. This is very important as the DOH I.T. Team use this to create the Network Account for the user.

Job Title – Job title of applicant.

Work Phone Number – Work phone number of applicant. Include area code.

Extension – Work phone number extension of applicant.

Email address – Work email address of applicant.

Agency Name – Name of CAREWare agency user needs to be added to, closed out from, have user level adjusted at, etc.

Agency Address – Address of agency.

Agency City - City where agency is located.

Agency Zip – Zip code of agency.

User Access Level – Identify the level of access the applicant should be given for each corresponding agency. Select one group. (Below descriptions are not complete descriptions of the group rights, they are short synopses to give a quick breakdown between the different groups.

Basic User – This is the standard group most users are added to. The core functions these users can perform are add/edit/delete data and run reports.

View Only – This user can view data but cannot add/edit/delete it.

Provider Administrator – Users in this group have all the rights of the Basic User with some additional rights. These include the ability to run client merges, unlock/lock users and edit value lists. Additionally, we contact the Provider Administrator of an agency to have them approve adding/removing/adjusting the rights of users within their agency. If you do not want a person to have the ability to approve or request new users, close out accounts, etc., do not grant them the Provider Administrator User level. Each agency should have a maximum number of two Provider Administrators.

Reporting Unit – This group is for the HIV/AIDS Patient CARE Resources Program, Reporting Unit staff.

Community Programs Unit – This group is for the HIV/AIDS Patient CARE Resources Program, Community Programs Unit staff.

Help Desk – This group is for the Tallahassee DOH Help Desk staff.

Additional User Groups – Placing check marks in these boxes will add rights to the user's current profile. Only those groups marked on the current form will be applied to the applicant. If a user previously was a member of the PDI User group and a new CARF was completed with only Edit Values checked under Additional User Groups, then the user would be removed from the PDI User group. If the applicant should still remain a member of the PDI User group, make sure to check that box on the current CARF.

Be aware, users who are Provider Administrators are already members of the following groups: Contract Set Up, Delete Merge Client, Edit Values and User Administration.

Contract Set Up – Allows user to add/edit/delete contract information

Delete Merge Client – Allows user to run the merge client operation as well as delete clients.

Edit Values – Allows user to adjust data within custom fields, such as a local case manager field. A person in this group can add new or remove inactive case managers in the case manager field.

Mapping Group – User in this group can map values for data imports.

PDI User – Allows user to run the Provider Data Import for their agency.

Sharing Approver – Allows user to approve sharing requests from other agencies.

Sharing Requestor – Allows user to make client sharing requests from other agencies.

User Administration – Allows user to unlock/lock users and change users' passwords.

Agency CAREWare Provider Administrator (Print Name, Signature, User ID) – Forms will not be approved without the signature of a person in authority. Having Provider Administrators sign off on CARFs is our preferred method of approval. However, in certain circumstances we may allow other individuals to approve CARFs. HIV/AIDS Program Coordinators, Agency Executive Directors or the CAREWare System Administrator are some examples of other staff who on occasion may be approved to sign off on CARFs. Provider Administrators can only approve CARFs for their agency. For example, the Duval CHD Provider Administrator cannot approve adding a new user to the Palm Beach CHD Agency.

Comments box – When “Other” is selected as the request item, please detail what action you need completed for the user.

General Notes:

If an applicant requests access to multiple agencies, a separate CARF must be completed for each individual agency. The exception is when the same person is the CAREWare Provider Administrator at each additional agency. For example, if Barney Ruble is an applicant requesting access to 5 domains and Fred Flintstone is the CAREWare Provider Administrator at all 5 domains then one form may be completed. The primary agency Barney Ruble belongs to will be inputted in the Agency Name field. The additional agencies will be added to the comments box. The User Access Level and Additional Groups marked on the CARF will be applied to all of the agencies. Fred Flintstone has the authority to sign this document as he is a CAREWare Provider Administrator at each location. However, if Barney Ruble is requesting access to 5 domains with different User Level Access or different Additional User Groups at each site, then a separate form needs to be completed.

HOPWA Exit Outcomes and Pre-Enrollment Situation Definitions

HOPWA Outcome	Definition
Current housing arrangements more STRMU	Currently housed and will continue to need STRMU assistance
Deceased	
Disconnected	Out of care
Emergency shelter/streets	Example: hotel, motel with emergency voucher
Incarcerated	
Institution	Behavioral center, nursing home, long-term hospitalization
Other HOPWA support	Client has transitioned to another HOPWA funded program, e.g. TBRA
Other private housing w/o subsidy	Client is stably housed without assistance
Temporary /non-permanent	Client is temporarily housed without assistance
Other housing subsidy	Client has transitioned to other housing program, e.g. Section 8
Transitional facility/short-term	Example: Halfway house
Pre-Enrollment Situation	Definition
Don't know or refused to answer	
Emergency Shelter	Example: hotel, motel with emergency voucher
Family/friends	Staying or living in someone else's room, apartment or house
Foster care home/group home	
Hospital (non-psychiatric)	
Hotel or motel (w/o emergency voucher)	
House they owned	
Jail, prison or juvenile detention facility	
Not for human	Place not meant for human habitation (car, abandoned building, etc.)
Other	
Permanent or formerly homeless	Example: Shelter Plus Care, SHP or SRO, Mod Rehab, etc.)
Psychiatric hospital or facility	
Rented room , apartment or house	
Substance abuse facility	
Transitional housing for homeless	Example: halfway house